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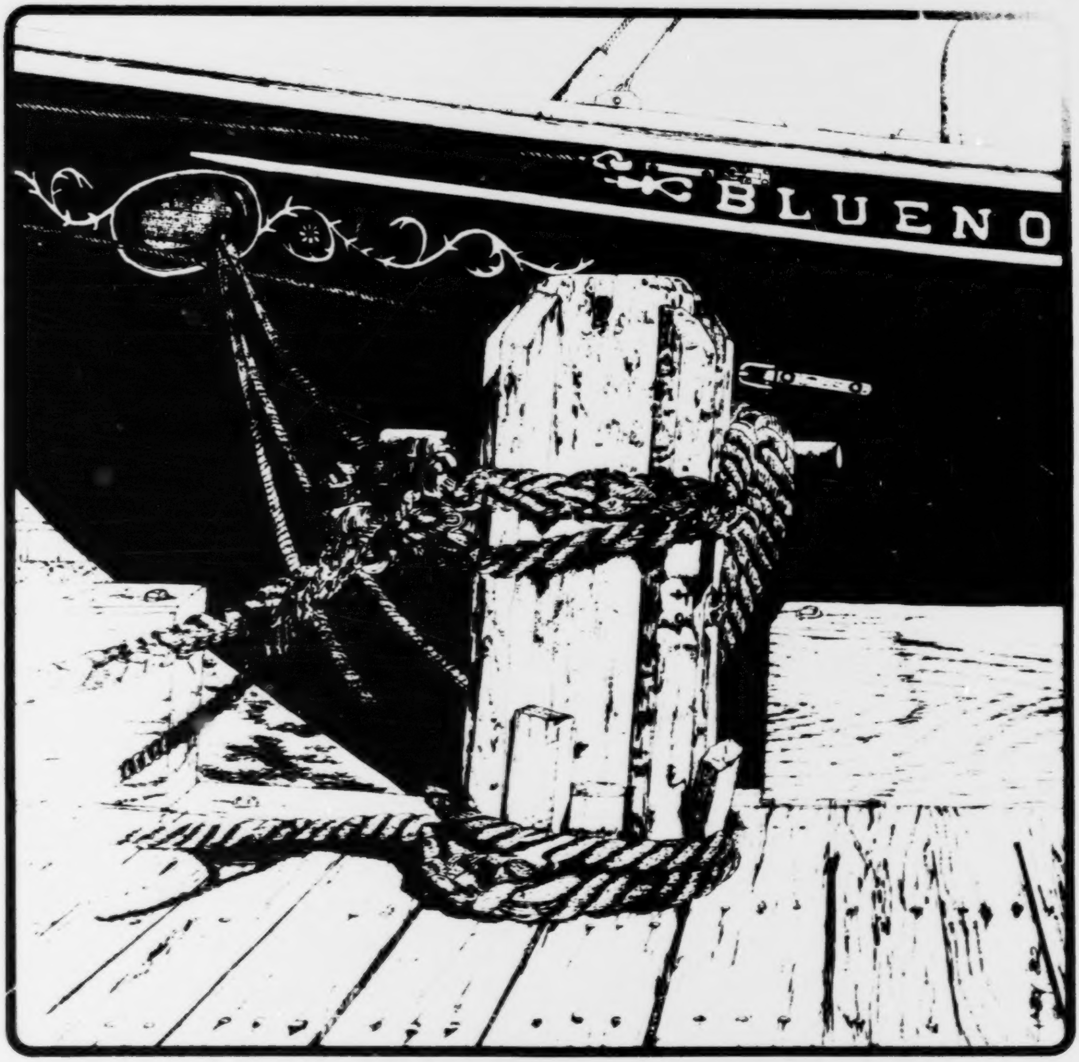
PROVINCIAL TOURISM MASTER PLAN



BY

Tourism
Nova Scotia

FOREWARD

Since the fifties, tourism has become one of the fastest growth industries, both at a provincial and global level. Provincially, revenues from this industry have risen from approximately $56 million in 1971 to $500 million in 1981.

Tourism is a comparatively pollution-free resource industry which in most cases provides the opportunity to appreciate natural resources rather than deplete them. Instead, the resources of tourism enhance the quality of life of residents and non-residents alike.

As well, development and maintenance of such tourism products as transportation, accommodation, food and beverages, recreation and entertainment involves a labour intensity which is extremely important in the economy of the 80's. The Canadian Government Office of Tourism (C.G.O.T.) has estimated that tourism expenditure "probably has a greater impact on employment than similar spending in the nation's 40 plus industries."[1]

Infusion of new tourism dollars into the provincial economy by non-residents goes beyond the above-mentioned direct dollar impacts. Through the multiplier effect - the change in income due to the autonomous injection of expenditure into an economy - tourism expenditures stimulate additional business activity, household incomes and employment throughout the whole economy, not just the tourism sector.

In Nova Scotia, approximately 8% of all jobs are tourism related. Combined with employment created in spin-off industries (industries that service the tourism sector), it is estimated that close to 30,000 jobs with an annual payroll of $261,000,000 are derived from tourism.[2] In addition, taxes generated by the travel industry in Nova Scotia inject over $30 million into provincial revenues.[3] These governmental revenues in turn go towards enriching and enhancing the lives of Nova Scotians.

Thus, as the statistics indicate, no economy should underestimate the present nor potential value of this industry. It was in light of such facts that the provincial government in cooperation with the travel industry (private sector) began a major reanalysis of the tourism industry in Nova Scotia, both presently and for the future.

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Nova Scotia

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The Process

THE PROCESS

A. Development Strategy:

Initial steps toward the preparation of a Provincial Master Plan for Tourism were undertaken on two separate, yet very related, fronts. Firstly, the "software" elements of the plan were tackled through the auspices of Voluntary Planning. The Tourism Sector Committee of Voluntary Planning is comprised of hotel/motel and campground operators, restaurant and gift/craft store operators as well as representatives of TIANS and all tourist area and industry associations in Nova Scotia.

This largely private sector Committee and its subcommittees made a long and substantial study of the travel industry in the Province. As a result of their efforts, their final document Tourism Development Strategy, Nova Scotia[4] was approved by Cabinet in 1981, thereby reaffirming the importance of the travel industry to the Province.

B. An Assessment of Opportunities:

On a second, yet parallel front, the Department of Tourism commissioned Consultants[5] to prepare, during the early 1980s, a series of Regional Tourism Development Studies for all of the seven designated tourism regions in the Province. To complete these, heavy emphasis was placed on private sector involvement with meetings being held throughout the Province, through the cooperation of the Area Tourist Associations.

Once complete, specific developmental opportunities were extracted from the regional plans and consultants were again hired to devise a method of assessing the many proposals contained in the plans. The Consultants[6] devised a unique voting process by which regional developmental proposals were matched with universal planning criteria, to ultimately determine an objective priority list of proposals for each region. Again, meetings were held throughout the Province to gain the private sector input, so essential to this process.

The next stage, involved the combining of the regional priority lists of proposals into a comprehensive yet flexible list of tourism opportunities for the Province. This stage was completed with the submission by the Consultants of their final report entitled: Assessment of Developmental Priorities in the Tourism Sector[7]

Master Plan:

The completion of the present report relies heavily on the two documents mentioned above. Full credit must be given to Voluntary Planning and the various Consultants involved, for the arduous task undertaken in analyzing such a complex business as the tourism industry. Though other reports have been utilized in this document to obtain more current statistics, this does not detract from the importance of the two main documents mentioned previously. The Provincial Tourism Master Plan is designed to mesh together the specific tourism opportunities derived from the private sector with the current and projected trends and strategies within the travel industry. Together, the opportunity inventory and the strategy will provide a general development plan for Nova Scotia in the 1980's and beyond.

The ultimate objectives of the development planning are to:

- Provide guidelines for the future tourism industry of Nova Scotia both for the private and public sector.

- Increase Nova Scotia's share of tourist visitation, revenues and benefits.

- Provide a better and more varied social, cultural and physical environment for Nova Scotians.

Part A

Development Strategy

A. DEVELOPMENT STRATEGY

As previously mentioned, with the completion and subsequent cabinet approval of the document Tourism Development Strategy, the groundwork has been laid for the "software" component of the master-planning process. The policy initiatives proposed result from intensive discussions at many meetings involving Voluntary Planning and other individuals concerned with the future of the industry.

The rapport developed between government and the private sector is one of the most significant results of the planning process and will pay dividends in the future.

The following section is copied directly from the Voluntary Planning brochure/document which lists and summarizes the Tourism Sector Committee's recommendations.

A Changing Market Environment

In the next ten years important changes will occur in the tourism market. Nova Scotia's traditional market has been the travelling family from central-eastern Canada and the northeastern states, in cars or larger recreational vehicles.

Demographic

More women in the labour force will generate more discretionary income for two income childless couples or retired people.

With fewer children in the population, family travel will decline.

Earlier retirement and aging trends means a population with more older people; there will be a significant segment of middle-aged and elderly travellers.

Patterns and Behaviour

The rising cost of gasoline and the use of smaller vehicles will reduce family travel but there will be growing popularity of package and group travel, bus tours, fly/drive packages, and specific vacation experiences.

Location

The distribution of population and incomes is changing markedly in North America. In the United States rapid population growth is occurring in the southwest and in Canada both population and per-capita incomes are rising faster in the western provinces than in other parts of the country.

The greatest increase in real wealth and disposable income is in Japan and western Europe. Nova Scotia has not yet been able to move into the Japanese market nor has Europe been a major target for provincial tourism marketing.

We must start moving into the lucrative offshore markets to counterbalance the slow growth of disposable income in our traditional markets.

Recommendations and Action

The emerging business environment for tourism is a global and increasingly competitive one.

The short season and labour costs in Nova Scotia make it difficult for our industry to compete. Our best chance to grow is through improving the quality of our facilities, services and marketing.

We recommend the following proposals for promotion of the tourism sector, a combination of government initiatives and self-help steps taken by the Nova Scotia tourism industry.

Better performance is the central theme; to achieve this we must:

raise the professional standards of people working in the industry;

establish and maintain adequate quality standards;

improve the focus of tourism marketing;

offer new products and services;

emphasize cooperation and joint planning by government and industry.

A)Upgrading Human Resources

Trained professional managers and trained employees are vital to tourism development and complement physical and capital resources. Tourists are becoming more sophisticated and the demand for a consistent standard of service will increase.

The quality of people in the industry relates directly to the skill and professionalism of management and the improvements agreed to by government and the industry itself.

Management Enhancement

A management workshop/seminar program is to be conducted in all regions of the province during off-season months to provide professional guidance in such areas as:

management planning, financial control systems, marketing, motivation and employee supervision.

A business training program will help managers in upgrading their skills through university, business or correspondence courses.

The industry can itself generate ways of improving management skills. Publications should feature more articles on management problems and recommend solutions. Managers should participate significantly in government-assisted training programs for supervisory personnel.

Manpower Development

A review of manpower training programs will be undertaken jointly by industry and government. It will help identify problems and determine specific personnel requirements on a continuing basis.

A job classification and certification program will be introduced to identify employees with demonstrated skills; this will improve employee mobility and upgrading and stimulate a high level of professionalism.

Educational Support

A Nova Scotia Hospitality Institute is being established.

It will:
serve as a coordinating agency for tourism training and education within the province.

administer a student internship program to place candidates in appropriate private or public sector operations for short training periods;

arrange courses for tourism employees at a regional facility or on site, on a cost-shared basis. This will allow current employees to improve their skills.

Industry Advice

Industry must take the lead through the Provincial Advisory Committee on Hospitality Education, in the assessment of future manpower and management needs and in developing training programs.

The Advisory Committee will provide advice to the Hospitality Institute and to the government.

Government financial and staff support is necessary for the Advisory Committee on Hospitality Education.

B)Quality Evaluation System

A system of evaluating quality is an absolute necessity if the industry is to remain competitive. The information is needed to sell to experienced travel consumers and tour packagers, especially in the new market areas the industry needs to penetrate. Evaluation also stimulates facility improvement and outlines a framework for future development of standards.

The system is to be developed and led by the industry. The quality evaluation system requires:

industry direction and control;

participation on a voluntary basis;

evaluation of physical amenities and quality of service;

evaluation based on current standards developed in the industry;

provision for appeals.

C)New Markets and Marketing Approaches

Since the competitive global marketplace is undergoing fundamental changes in demographic structures, income distribution, modes of travel and consumer behavior patterns, Nova Scotia cannot expect increases in tourist traffic irrespective of its marketing effort. Nova Scotia's marketing effort takes on greater importance than ever before.

The Nova Scotia Department of Tourism now undertakes a significant tourism marketing effort on behalf of an industry which has been unable to market on its own because of small unit sizes. It is essential that the provincial marketing effort remains effective. It is also necessary to encourage more active and effective participation in marketing by the industry.

Comprehensive Market Research

A significant market research program will identify promising new areas, segment traditional markets, and form the basis of an improved provincial marketing strategy.

Market Information and Assistance

A Market Research Group Assistance Program will cost-share with the Tourism Industry Association of Nova Scotia (TIANS) the hiring of the market research group:

to provide market tips to operators via a monthly bulletin;

to produce an annual market report analyzing the past year's performances;

to provide timely information on market trends and conditions;

to provide suggestions on how to exploit identified market opportunities.

D)New Product Concentration

The tourism industry in Nova Scotia has developed in response to past travel behaviour and tourist demands. Family travel by automobile resulted in the growth of roadside campground, motel and eating establishments.

The energy crisis, changing structure of the population and global wealth shifts are all affecting the industry.

These changes in the marketplace are accompanied by changes in the competitive environment. Other travel destinations are successfully selling packaged vacations, holidays offering a wide range of activities and services in a concentrated area, and specialized vacations appealing to specific market segments. Other destinations are aggressively entering the marketplace for the same clients.

In response, government will support industry-led efforts to develop products and services to meet new market demands and new competitive pressures.

Attractions Assistance

Assistance will be provided for the creation of attractions operated by the private sector. Attractions offer interest, entertainment or activity and draw visitors.

Attractions should:

have community support;

relate to the market;

interact with other facilities and;

provide services to attract and retain visitors.

Specialty Tours

The types of assistance available for designing specialty tours will be extended.

Non-financial assistance for tour promotion is now available through the Department of Tourism. However, the possibility of providing financial incentives and planning assistance should be examined.

Events

Government must assist in the planning, promotion and coordination of events to ensure that they complement attractions and specialty tours and that planned events make full use of facilities.

Loan Assistance

The provincial government already provides financial assistance to tourism operators in the form of subsidized loans offered by the Nova Scotia Resources Development Board (NSRDB).

The industry has indicated a clear preference for low interest loans and deferred costs as opposed to grants.
The following lending policy is proposed: The business plans provided by operators seeking assistance from NSRDB will be routed through the Deputy Minister of Tourism to ensure compatability with the tourism strategy for the Province. The Deputy Minister's advice will be given to NSRDB, which has responsibility for final loan approval.

Industry Support

Business advice and planning assistance programs can be more actively promoted through a new Industry Development Division of the Department of Tourism and should ideally be delivered to the individual clients.

Industry Financing

Concentration on product development will require substantial financial resources, both public and private.

The private sector must take the initiative in securing additional financing.

Several financing options exist:
Loans via an industry association credit union to spread both the burden and the risk.

The Venture Corporations Act which encourages investors to place equity in small business, including tourism operations. Under this Act, the Province matches all private money invested in the venture corporation with a 10-year interest free loan and the corporation must then invest in eligible Nova Scotia small businesses.

Government Financing

Significant contributions of public funds are needed to realize future opportunities in the sector.

The provincial and federal governments have already provided assistance through the Tourism Subsidiary Agreement, a $13.75 million agreement cost-shared 80% by DREE and 20% by the Province. This agreement, due to expire in 1982, has an emphasis on infrastructure and facilities -- the "hardware" of development.

The new tourism strategy shifts its attention to human resources and marketing -- the "software" of development.

The "software" development component will be a key element of the Province's approach to future federal-provincial initiatives.

E)Business/Government Relations

A major thrust of the tourism development strategy is that government and industry cooperate on a continuous basis. It is important in a changing world that people work together to realize the full development potential of the sector.

The Tourism Industry Association of Nova Scotia (TIANS) has a significant role to play in bringing elements of a diverse industry together.

The Regional Tourist Associations have been active in detailed planning and coordination.

The Tourism Sector Committee of Voluntary Planning further assures industry/government consultation.

The Department of Tourism is undergoing a reorganization to enable it to better respond to new challenges and opportunities.

A Program of Assistance for Marketing Consultants will provide operators with better access to professional market assessments and will help identify market plans.

Direct selling assistance will encourage operators to do more direct selling to tourists and travel brokers by cost-sharing promotional trips to markets outside the region and attendance at trade fairs.

The Check In's System

Nova Scotia is fortunate to have in place a computerized Check In System which allows tour operators, travel agents and individuals to gather information and make reservations efficiently and well in advance.

The industry must more actively support Check In by providing both current and forecast information and through universal registration with the system.

Check In should examine its promotion to the industry and its fees as well as continually evaluate the quality of information provided.

The previous initiatives involve a combination of proposed government programs and self-help measures for industry. These measures promise to be effective but only if the private sector takes the lead. Ultimately the responsibility of building a more profitable tourism sector rests with the operators themselves.

Government, through the Department of Tourism, is committed to undertaking a stronger coordinating role with industry. Government/business relations should be viewed as a continuous process. Closer contact between the Department, the TIANS executive and the Voluntary Planning Board is essential.

The Department of Tourism can act as the focal point for communication between government and industry on issues which the Department can deal with itself and on complex issues which involve other agencies.

For example, transportation issues can be dealt with as follows:

Each transportation-related issue requires careful definition and systematic study by the industry.

The industry should develop its position on matters under provincial jurisdiction such as highway signage, reststops, look-offs, and tour bus licensing and should seek action and administrative follow-up through the Department of Tourism.

Industry recommendations on matters under federal jurisdiction such as air fares, landing rights, ferry and rail service, should be made to the provincial Ministers of Tourism, Transportation and Intergovernmental Affairs. The Province can then represent the interests of the sector before the appropriate federal agency.

Prognosis

Policy initiatives proposed in this strategy represent actions which government and many industry people feel are crucial to important tourism opportunities in the future. The initiatives will not achieve dramatic results overnight nor will they be successful without the active participation of the private sector.

However, by implementing ideas raised in this Tourism Development Strategy, Nova Scotia's position as a favoured tourism destination can be assured.

A healthy tourism industry will continue to make a significant contribution to the economic, social and cultural well-being of the Province.

Part
B

Assessment of Opportunies

INTRODUCTION

Energy and Inflation

The two most widely discussed factors affecting tourism in the seventies and eighties are energy and inflation. These factors have not only affected the number of tourists travelling, but have also affected the expenditures, preferences and psychology of the tourist.

Energy

When the O.P.E.C. cartel emerged on the scene in the early seventies, energy gained an importance in the consumer-mind like never before. In the latter seventies, fuel shortages had a profound affect on the number of travellers to Atlantic Canada from the United States.[8]

In attempting to reduce fuel consumption, automobiles have become smaller and more fuel efficient. Fewer large recreation vehicles are seen on the roads. Vacations are taken closer to home in an attempt to reduce the fuel portion of the vacation dollar.

As well, the type of vacation taken has also been affected in that the auto traveller and the recreation vehicle (RV) traveller look for a destination point which supplies a full range of services and activities rather than circuit travelling throughout a region. The destination area serves as a home-base from which the traveller can take short side trips, thus reducing fuel consumption by increasing his length of stay at one spot. This trend can be seen in Nova Scotia where the accommodation length of stay in one spot has shown increases for the past three years.[9]

Through fuel conservation and the discovery of new sources of energy and oil, the dependence on oil from the Middle East has been reduced to the point that there is currently a world-wide surplus.[10] Unfortunately, this surplus has not worked in favour of substantially reducing prices at the consumer level, which have steadily climbed since 1979. In Canada, prices of fuel will almost double by 1986 as a result of the Federal/Provincial energy agreements.

Together, fuel shortages and the rising cost of fuel have resulted in a reduction in auto travel to the Province and an increase in the use of mass modes of transportation. In Nova Scotia, the motorcoach share of total travel to the Province has steadily shown growth since 1970. Though the auto remains the largest share of traffic to Nova Scotia, and will for many years to come, patterns of growth in other modes are beginning to emerge. There has also been an increase in intermodal travel as the tourist attempts to combine the mobility and flexibility of the automobile with money-saving mass modes of transportation.[11] The fly/drive, rail/drive, and fly/camp markets are examples of this intermodal travel.

The reduced concern about fuel shortages and the dropping of the international price per barrel of oil have lead some economists to predict that fuel will no longer be a number one concern for travellers. However, the rising cost of gas at the consumer/retail level and the psychology of fuel conservation will remain an important factor in travel considerations throughout this decade.

Inflation

Several years of high inflation has had the effect that travel growth cannot be taken for granted anymore, at least, not at the rates of growth once enjoyed. People will always feel they have the right to and deserve a vacation. However, rising prices in transportation, food and housing, etc. have greatly impacted on the amount of discretionary income the consumer has to spend on a vacation.

The inflation rate is expected, despite recent fluctuations, to continue at high levels over the next few years. With real incomes not rising as rapidly, growth in consumer spending is likely to remain subdued.[12] Inflation rates in Canada's other tourist markets are also affected so that "monetary authorities in most of the industralized countries have focused on inflation as the number one enemy to the resumption of steadily increasing growth."[13]

In an attempt to curb inflation, a tight monetary policy has been adopted. This policy has lead to high interest rates, high unemployment and stagnant disposable incomes with limited spending over the next few years.[14] Economic growth, throughout the eighties is expected to be slow to recover.

Rising prices have had the effect that the tourists of the eighties are more discerning and more demanding. They seek quality from every portion of their vacation dollar. The tourist, rather than give up a holiday totally, is learning to economize by travelling to vacation spots closer to home, taking fewer trips and increasing the length of stay at one destination. Many more are using mass modes of transportation and purchasing packaged vacations where costs are discounted and details are conveniently taken care of.

Demographic Changes

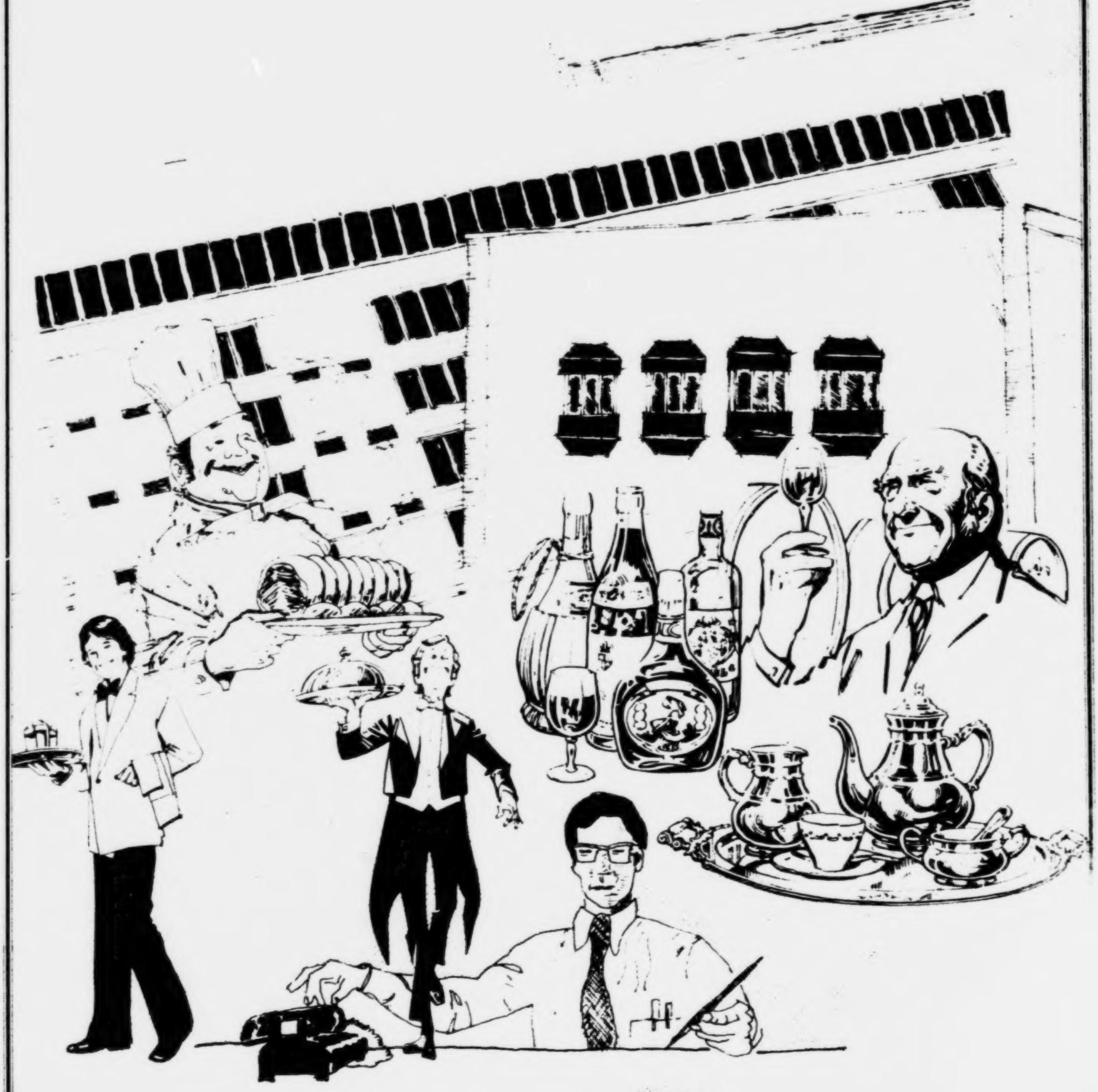
Changing demographic trends appearing in the tourism market will impact not only on attraction development, they will lead to adaptations in fixed-roof accommodation, restaurant and campground development. These trends will combine with economic impacts in the tourism market, requiring adaptations in all facets of the tourism sector.

One of the most noted demographic trends is the fact that the populations of Canada and Canada's major tourist markets are aging. In Nova Scotia, the percentage of those in the 20-44 age group has risen considerably while the percentage of those in the young dependent age group has decreased.[15] The percentage of population in the older age groups will also increase as the children of the baby-boom era mature.

Another trend, which helps to offset declines in descretionary income, is that more and more women have entered the work force in previous decades. There has been a substantial increase in two-income families. These families have fewer children, greater leisure time and more mobility. Single individuals and single parents are also increasing in frequency due to later marriages, divorce, or alternative life styles.

Populations are not only aging and changing family patterns, they have a heightened public awareness and higher levels of formal education. The demographic changes combine with the economic impacts mentioned previously to create a population more sophisticated in their vacation needs. The tourists of the 80's will be seeking self-gratifying and educating experiences at the same time they are seeking greater quality and service for their vacation dollars spent.

Management Training



MANAGEMENT & TRAINING

In too many instances, discussions of tourism development and planning deal only with the hardware side of the tourism product. These discussions often concentrate on physical projects relating to capital investment in construction of some type. However, "the quality of personal service provided to tourists is often as important as the quality of accommodation, food and attractions."[16]

The value-conscious tourist of the 1980s is willing to pay more for better service and a better product. The quality of service in turn depends on the skills and professionalism of the people working within the tourism sector. If Nova Scotia's tourism industry is to compete effectively, courses and programs must be designed to improve the skills and attitudes of individuals in all areas of hospitality service. Education and training in the tourism sector has an important part to play in creating a new, skilled labour force, as well as upgrading the skills and professionalism of those already employed. The hospitality industry offers good career opportunities but lacks awareness of both the scope of job opportunities and the need for skilled training.

For these reasons, Management and Training formed a major category of project lists voted on by the various tourist regions. Participants were asked to rank four different types of support for the industry in terms of training, information flow, and management development. Once again, there were regional and sub-regional differences but generally, the priority across the Province was as follows:

Manpower Development
Management Enhancement
Educational Support
Industry Advice

The importance of the Management and Training category to regional tourism development was very apparent in the results of the priority ranking sessions. The Cape Breton region ranked all four Management and Training proposals in the highest range. Across the Province, the majority of tourist regions ranked these four proposals in the high to middle ranges of priority.

Manpower Development and Management training received particular emphasis. These two proposals are very closely linked and should be developed simultaneously. The impact of developing one without the other will seriously hamper the overall benefits accruing to the tourism industry.

A recent study sponsored by the National Advisory Committee on Manpower Education and Training in the tourism industry, stressed the need for training and education in each of three levels of employment. The first two levels fall into the Management Enhancement category while the third level corresponds to the Manpower Development proposal mentioned above. On a national basis, the three levels of employment were broken down as follows:

Management Enhancement

5% Senior Management/Owners
15% Mid-Management/Supervisory Level

Manpower Development
80% General Employees/Rank and File

Each level of employment has its own particular needs and areas of education where training is required.[17]

While Educational Support and Industry Advice received less support during the ranking sessions, there were some views presented that Industry Advice should naturally continue to develop and expand, regardless of other priorities. Particularly, the South Shore region gave Industry Advice the highest priority among all categories.[18]

a) Manpower Development

At every point, the tourist comes in contact with a resident Nova Scotian, that interaction is telling the tourist something about our Province and its people. If visitors receive a friendly greeting and friendly professional service throughout their stay, they are more likely to return to the Province for another vacation, and they might recommend a similar vacation to friends and relatives at home. The interaction between those who work in the front lines of the tourism sector and the tourist is extremely important to the industry's well-being.

With the increased stress on service, increased competition and advancements in tourism sector technologies, there is an urgent need for the development of trained competent staff and dedicated, career-oriented employees. Increasing numbers of tourists are reporting their dissatisfaction with difficulties such as surly service help, long lines, frequent delays, mix-ups in reservations and shortages of hotel rooms when they travel.[19] Many of these difficulties could be avoided or handled by personable well-trained staff.

The rank and file employee which makes up the lion's share of employment in the hospitality industry, is in great need of programs aimed at skill upgrading and career development training.

The development of interaction skills with the public along with productivity and efficiency in every day tasks are becoming more and more important in today's market and economy. Skill development in the new technologies is also required as the use of computers is making greater inroads into management, accounting and reservation systems such that:

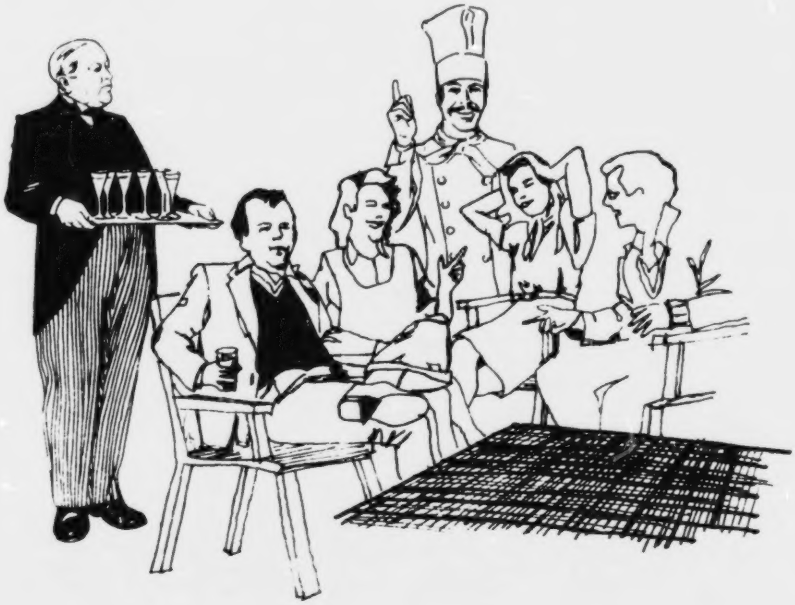
> Not one level of employment in hospitality/tourism has been unaffected by labour saving, drudgery reducing equipment, that is fast changing their (the employee's) work and allowing for more direct human relations contact between guest and operator. Not only do these employees require updated training on an ongoing basis, but management needs to become more cost-efficient in a world of a more well-travelled and discerning customer.[20]

Such skill-developing programs should also be coupled with programs aimed at motivational and career development training for employees.

It was recommended and supported by the industry, during the priority ranking sessions, that a major review of Nova Scotia's manpower needs in the tourism sector be undertaken. In addition, programs must be developed to improve the quality of personal service to tourists which includes meeting labour skill shortages; improving service by staff such as tourist information staff, tour guides, waitresses, front desk personnel, etc. As well, a program should be established to expand employee development and motivation through training.

b) Management Enhancement

With the many economic hardships facing owners/operators of tourist facilities, the manager of the 80s will have to improve efficiency and productivity to improve profitability and remain viable. Managers will have to be constantly alert to the price/value relationship by employing innovative techniques to improve service to customers while at the same time increasing the economic efficiency and professionalism of their operations. As well, in today's competitive market, the modern manager must keep himself and his staff abreast of changing trends and new developments within the tourism industry.



To improve management skills, tourism-oriented business programs and training manuals must be developed to assist managers in adopting newer and more professional techniques in areas such as financial control systems, management planning, purchasing, marketing and promotion as well as in hiring, employee training, supervision and motivation. Such programs should be developed on a cooperative basis between the industry and government with public programs supporting and building on private sector training and development programs, utilizing the expertise from both the public and private sector.[21]

c) Educational Support

The Educational Support proposal dealt with the need for an educational framework in which training programs can operate to improve human resources and create a pool of skilled labour upon which the tourism industry can draw. The key to such a framework is flexibility to provide a wide variety of training options, from full degree programs in tourism, to courses and seminars aimed at developing special targeted skills.

Across Canada there has been a significant rise in the number of college and university courses and degree programs in tourism-related fields. In Nova Scotia, institutions such as Dalhousie University, Mount Saint Vincent University and the College of Cape Breton are showing greater interest in providing tourism-oriented programs. The labour intensity in the expanding tourism sector of the economy, combined with the universities' and colleges' need to enlarge enrollments, will work to increase the number of tourism-related programs in the future. In an increasingly complex industry, formal degree programs, both undergraduate and post graduate, are particularly essential for those planning managerial and supervisory-level careers in the hospitality industry.

To supplement formal degree programs, flexible alternate programs must be developed so both employer and employee may 'earn while they learn'. Night courses, weekend seminars and correspondence courses are some of the options to be explored by universities, colleges and vocational schools to accommodate those already employed in the industry. Where such institutions do not exist, regionally-based public and private programs, workshops and seminars must be developed on an off-season basis. Where possible, on-site educational courses should be combined with an apprenticeship training program to provide valuable on-the-job experience.

In addition to developing educational and training courses, it has long been proposed that a Nova Scotia Hospitality Institute be established. While the exact organization of such a centre is undergoing further investigation, the Institute would function initially as a coordinating and administrative agency for tourism training and education in the Province. It could, if desired by industry, develop in time into an educational facility.[22]

The Hospitality Institute should provide a forum in which effective human resource planning and implementation can be achieved. The Institute working with the Provincial Advisory Committee on Hospitality Education should work towards an assessment of current and future human resource needs throughout the Province. An organization such as the Institute would greatly aid in the establishment of effective and standardized training curriculums based on the industry's immediate critical needs.

Another element of the Educational Support proposal concerns the development of awareness programs. On a general level, programs should be developed which increase public awareness as to the value of tourism in the Province. Greater understanding of the tourism industry and the importance of giving a friendly and helpful reception to visitors must be promoted amongst the general public on an on-going basis. Such programs will in turn increase public support for tourism industry initiatives.

On a more specific level, increased awareness of the need for training must be heavily promoted throughout the hospitality industry. The benefits of training in terms of increased productivity, decreased job turnover and greater customer satisfaction, must be stressed to industry management. In turn, management must encourage staff to upgrade their skills through the use of outside educational courses and through the development of in-operation training programs and incentives.

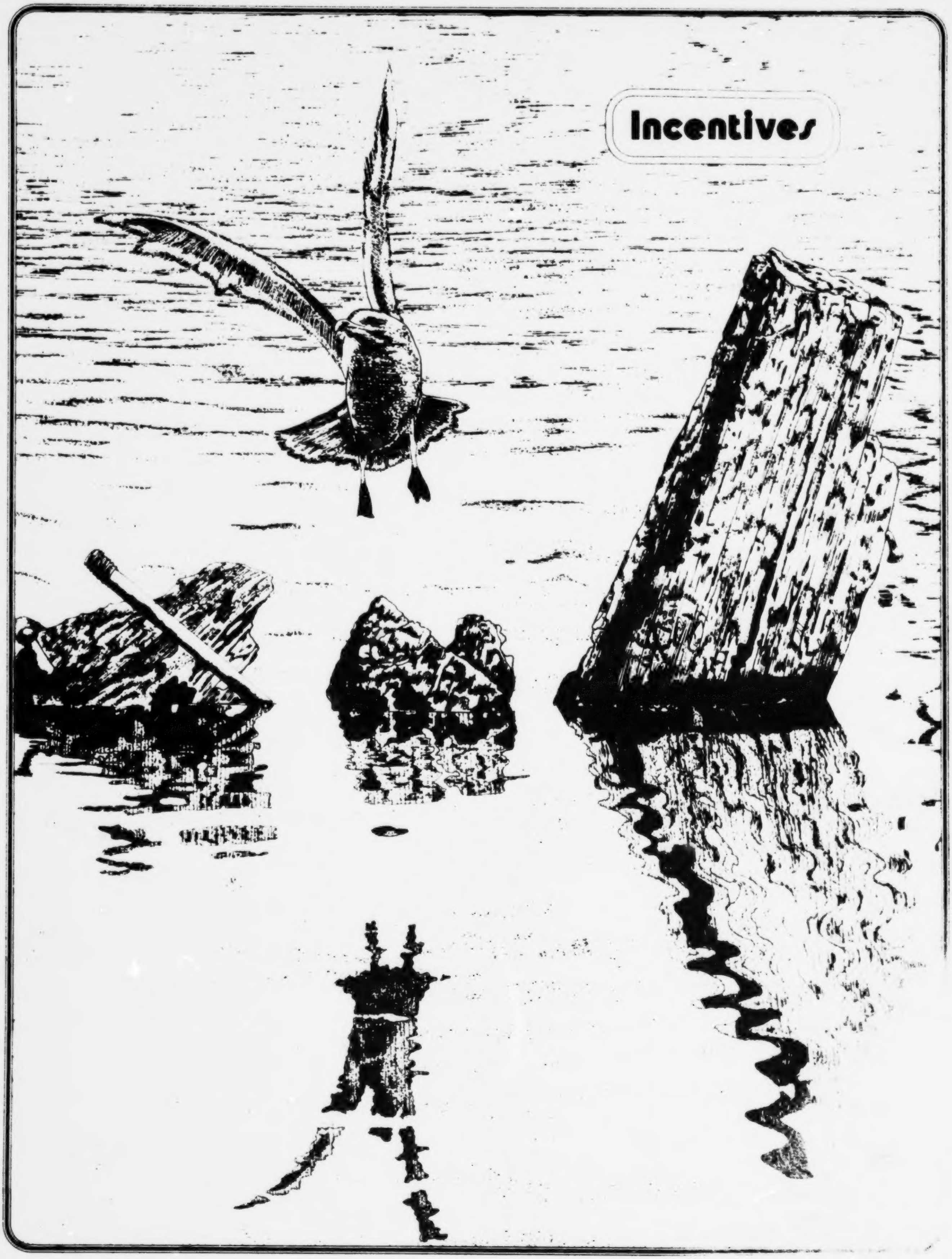
d) Industry Advice

The Industry Advice proposal recommended that an ongoing communication take place between the industry and government to ensure that training programs are developed and delivered to meet industry needs. Though this is true, "it is essential that industry take the lead in both assessing future manpower and management requirements and in developing programs and curriculums."[23]

The Provincial Advisory Committee on Hospitality Education will provide the arena in which such a communication can take place. The Committee should operate on an independent basis, allowing it the freedom to interact with its various membership associations while seeking advice from such governmental agencies as Employment and Immigration Canada, the Department of Education and the Department of Tourism, to name just a few. When the needs of the industry have been properly assessed, the Committee can then offer advice to educational institutions and other training organizations. Once appropriate programs have been developed, further communication by way of feedback will be required. In addition, heightened communication will be necessary to inform the industry's operators and employees as to program timing, availability, requirements and qualifications.

With industry and government working together, training resources in the Province can become assimilated and coordinated to meet demand. Ultimately, the efficiency of staff and management in the hospitality industry will be improved for the financial benefit of individual establishments and for the overall benefit to the economy of the Province.

Incentives



INCENTIVES

Accommodations

In Nova Scotia, the greatest proportion of the tourist dollar is spent on accommodations by resident and non-resident travellers. Total licensed rooms available in commercial accommodations was 10,771 rooms in 1981. Of these rooms, the average annual occupancy rates show a breakdown as follows: 61% for hotels, 57% for motels, 33% for tourist homes (a private home providing 3-5 rooms) and 45% for cabins (a separate building containing a rental unit of one or more bedrooms).[24]

These occupancy rates show a considerable underutilization of accommodation facilities in the Province. The rates also point out one of Nova Scotia's major problems for attractions and accommodation facilities, namely, seasonality. During the July and August months, many commercial establishments enjoy 80-100% occupancy rates. However, when combined with spring, shoulder season and winter months, the rates drop drastically.

However, since 1978, non-resident auto traffic in July and August has remained fairly constant as 25% to 29% of traffic. The months of June, September and October have shown increases in non-resident auto traffic shares. As well, in 1981, more tour buses entered Nova Scotia in September than either July or August.[25] Changing travel trends may be affecting the standard pattern of seasonality. As families have fewer children, marry later and individual travel increases, there is less need to gear one's vacation to facilitate the school season for children. The tour bus market also shows great potential for expanding the tourist season in Nova Scotia.

Seasonality causes two major problems in the commercial accommodation sector. Low occupancy rates during the off-season means reduced cash flow, increased difficulty in obtaining risk capital and the loss of trained staff due to necessary lay offs. In addition, during peak season when occupancy rates are their highest, increased competition for services occurs between resident and non-resident tourists. Operators must become adept at capacity management as well as exploring opportunities to extend the season in the areas of package tours, resident travel appeals and conventions/meetings.

In today's economy, owners/operators in commercial accommodations are faced with other major problems. Energy costs have hit the lodging industry by reducing pleasure and business travel while also raising operating costs. High interest rates have had their effect on capital spending within the industry through both the unavailability of low-cost financing and rising construction costs. As a relatively labour-intensive industry, rising labour costs have also combined with other costs such as mortgage rates, utility rates and taxes to reduce the profitability of operations.

The overriding temptation is to raise rates, passing these additional costs onto the consumer. However, to simply raise rates could be dangerous in today's tourism market. There is some resistance to raising prices as accommodation costs are only part of the traveller's expenditures. Other components are rising in price such as gas, air fares and food costs. There is also the danger in raising prices to too high a level that Nova Scotia will become less and less competitive with the product elsewhere in the tourism market.

Certain price increases are inevitable. However, with the better educated, value-conscious traveller of the 80's, any increases in price must be coupled with an increase in service and quality. In the 80's, "new and innovative techniques for satisfying the requirements of groups, tourists and businesses are, and will continue to be necessary to assure growth and vitality" in the accommodation industry.[26]

Restaurants

Spending on meals and beverages takes up the second largest proportion of the vacation dollar in Nova Scotia. The restaurant industry of the Province is vulnerable to many of the same problems facing the accommodation industry, namely, seasonality, high operating costs and high interest rates.

However, many of the demographic changes affecting the tourism market, reflect favourably on the restaurant business. Women in the work force are beginning to make more substantial income gains. The number of one and two member families as well as the number of two-income families will continue to rise. Fortunately, these groups tend to travel more and expend more on meals outside the home.[27]

Inflationary menu price increases have affected the tourist and restaurant-goer in two ways, some are having picnics and going to less expensive restaurants such as fast-food chains. Others dining out are exchanging two or three visits to a restaurant for one very special meal out. All, however, are seeking good service, good food and value for their money.

Also, as the tourist seeks a more self-gratifying, self-educating vacation, today's restaurant-goer is looking for an "experience" in dining. Ethnic restaurants offering unique entries on their menus related to the local culture will continue to increase in number. General restaurants are beginning to offer menus with local, or regional dishes and produce as well as offering a variety of portion sizes and a pleasant casual cuisine. The wise restauranteur of the 80's will make every effort to improve service and "offer their customers particularly attractive and cost-effective alternatives to the hot stove and dirty dishes."[28]

Many restauranteurs and accommodation owners/operators are offering special package deals to break into the group travel and fly-drive markets. Through packaging, discounted prices are offset by increased volumes. New alternatives need to be explored to take the best advantage of changing markets and economies. Cooperative purchasing plans, cooperative/combined specialty discounts, to allow smaller restaurants in close proximity to gain appeal to bus tour traffic, are examples of such alternatives. But, as stressed previously, efficiency and quality is the key, with stress on value not on reduced or cheap price.

Country Inns/Bed and Breakfasts and Farm Vacations

The country inn, bed and breakfast and farm vacation type of accommodation is experiencing a revival in popularity throughout

North America. Establishments of this type are appealing to both the young and older couple interested in a quiet weekend away from home. They have the potential to be marketed as an economic way to spend a restful weekend on a year-round basis. The role of this type of accommodation goes beyond that of providing the visitor with a night's lodging, to that of providing a unique vacation experience which is an attraction in itself.

Campgrounds

Travel and demographic trends are also having their impact on the camping industry. Energy costs have greatly affected recreation-vehicle traffic. As discussed previously, many are now using these vehicles as a more stationary form of accommodation with less touring and greater lengths of stay at one location being the trend.

Many tourists are adapting to inflationary vacation prices by turning to the camping mode of accommodation. In 1981, there was a 7% increase in private sector registrations to campgrounds in the Province. Also, party nights at private sector campgrounds increased by approximately 29% in the same year.[29]

The campers of the 1980's, however, are more demanding vacationers. They seek better serviced campgrounds which offer a variety of facilities and recreational opportunities. Private campground owners offering such amenities as a swimming pool and expanded entertainment facilities may benefit from these changes. This is part of the general trend, that tourists are exhibiting an increasing desire for more active participation in recreational facilities specific to their destination point.

In 1981, the number of unserviced sites in the Province decreased by 13.3% while the number of serviced sites increased by 37% to 7,481 sites.[30] Though campground owners may be slowly adjusting to changing travel trends, both private and provincial campgrounds are faced with similar rising construction and operating costs as in the accommodation and restaurant industries. In recent years this has reduced competition between private and public campgrounds. Any further development in the campground segment of accommodations should foster this trend with the objective of minimizing public and private competition.

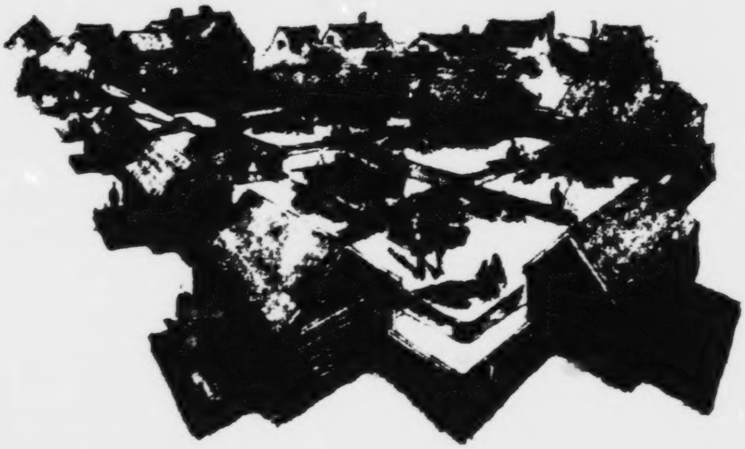
Incentives and Facilities

To aid the accommodation, restaurant and campground industries, general incentives and development programs were included in every project list during the regional voting sessions. These incentives programs were designed to aid these industries in offsetting some of the rising costs of financing which are hampering improvement and expansion of facilities.

An incentives program for fixed-roof accommodation and restaurants and an incentives program for campgrounds were voted on separately. The regions also voted on the development of programs for bed and breakfasts/country inns and farm vacations. The results of the priority setting sessions on these programs illustrated the variety of needs within the different tourist regions. The general consensus expressed, however, was that government should provide an incentives program to the private sector which will allow the industry to respond, depending on demand, to the differing regional characteristics and needs.

During the voting sessions, the greatest general support was for an incentives program for the fixed-roof type of accommodation and restaurants. Regional differences did appear however, with three regions indicating high priority for developing bed and breakfast programs, three regions ranking campground incentives high and two regions giving strong support for developing farm vacations. As a result, the Consultants recommended that an incentives program be designed which will be flexible enough to aid those areas requiring assistance for bed and breakfasts, farm vacations and campgrounds program as different from hotel/motel and restaurant incentives.[31]

Any incentives program should also be flexible enough to aid those requiring direct grants with those wishing low-interest loan assistance. Many operators in the industry have expressed their dislike of grants as a business incentives.[32] However, during the incentives program offered under the existing DREE/Tourism Subsidiary Agreement, a greater number of operators selected the grant form of modernization assistance than those requesting interest-rebate assistance. This may be partly due to the seasonality of the accommodation industry which prevents the smaller operator from assuming increased year-round debt loads.[33]



Incentives and Attractions

Although the voting format and the previous discussion has centered on incentives as they relate to the accommodation and restaurant segments, any incentives program should also provide for assistance to the attractions segment of tourism. Specific attractions are discussed in more detail in a later chapter of this report, but in general, a program should be developed to include assistance for the creation and enhancement of private sector attractions. Attractions in this instance might include, but would not be restricted to, craftshops, local museums, specialty parks, festivals, etc.

No matter what the format, it is imperative that any incentives program be "coordinated with the strategic orientation that the Province and the industry are developing for the future."[34] The Province requires more hotels, motels, restaurants and attractions with the capacity and ability to handle bus tours, group tours, conventions and seminars. Bed and breakfasts, country inns and farm vacations should stress quality, hospitality and community involvement. Accommodations and food facilities should be located to complement existing centres. As an essential component of any destination vacation cluster, fixed-roof accommodation, restaurant and campground facilities and attractions must adapt to the changing travel demands of groups and individuals.

Rating System

Another proposal which was voted on by all tourist regions was the establishment of a provincial rating system for the accommodation industry. The Tourism Development Strategy paper of Tourism Sector Committee of Voluntary Planning stressed that:

> The issue is not that there are low quality establishments or low levels of service. Different types of facilities with varying levels of service appeal to different segments of the market. Each has merit and any given area requires facilities of various types and conditions to meet diversified demands. But travel consumers want the opportunity to make informed choices to fit their pocketbooks, their preferences and their vacation expectations.[35]

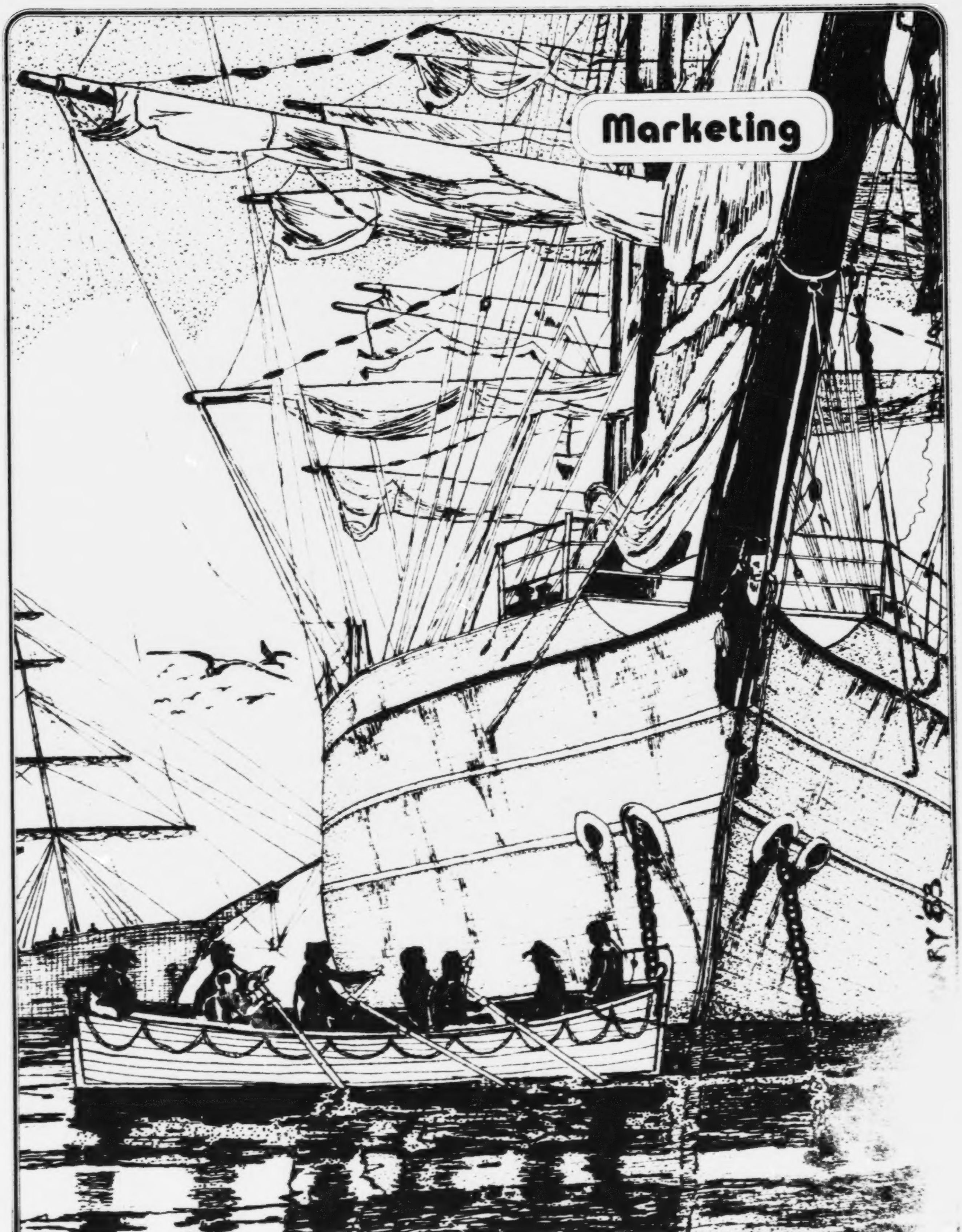
This type of information is also important to the tour operator or package wholesaler of vacation experiences.

During the priority setting sessions, however, province-wide support was not expressed for a rating system for accommodations. Only three regions ranked the establishment of a rating system very high while all other regions ranked it in the lowest-priority range. In some regions, it was felt that the smaller family-owned accommodation units would suffer from a rating system. It was believed these would be unable to compete with the varied services such as pools, saunas and lounges that the larger hotels can offer the tourist and business traveller. The Consultants recommend that the idea be discussed within the industry and developed further for future consideration.[36]

In the Halifax-Dartmouth region, a restaurant rating system was also considered due to the high concentration of eating facilities in this area. However, this proposal only received a mid-range priority ranking.

CHILDREN'S PLAY

Marketing



Marketing

Inflation combined with the dollar rate of exchange, media rate increases, a relatively stagnant marketing budget, greatly increased competition along with the growing sophistication in tourism marketing from many destinations, continues to make Nova Scotia's marketing challenge a crucial battle for tourism dollars. In the 1980's, "Nova Scotia cannot expect increases in tourist traffic irrespective of its marketing effort. Nova Scotia's marketing effort takes on greater importance than ever before."[37]

Domestic Markets

During these times of economic constraints, the Atlantic Region itself has become one of our greatest markets. Already comprising over half of Nova Scotia's tourist traffic, the proportion of non-resident auto traffic from the Atlantic region increased by 5% from 1980 to 1981.[38] Besides being the largest market, this market provides Nova Scotia with its greatest potential for repeat travellers. One marketing study found that the intention to vacation within Atlantic Canada exceeded interest in visiting this area by Atlantic Canada residents. The study concluded that many residents of the Atlantic region may dream about visiting other parts of the world, but they fall back on an Atlantic Canadian vacation for practical reasons.[39]

Within Canada, fewer Canadians are travelling to foreign destinations. In 1981, Canadian trips to the United States lasting one night or more decreased by approximately 4%. Canadian trips to countries other than the U.S. underwent a 6.8% decrease.

Nationally, the domestic market continued to account for Canada's largest share of tourism revenues, particularly from Ontario, Quebec, Alberta and British Columbia. Another nation-wide pattern which holds true for Nova Scotia is that "the main source of visitors for each province is each province's own residents (except P.E.I.), the second largest source is from the adjacent province,"[40] which in Nova Scotia's case is New Brunswick.

In 1981, approximately 50 percent of all non-resident motor vehicles entering the Province during the visitor season, entered from New Brunswick. Both New Brunswick and Newfoundland traffic recently showed a 6% increase over 1980 traffic figures. Outside of the Atlantic Region, the biggest domestic customers to Nova Scotia are the provinces of Ontario and Quebec in terms of auto traffic. Traffic has been increasing from the western provinces, particularly traffic from Alberta and British Columbia showed over an 18% increase in 1981, over 1980 visitation.[41]

In summary, the marketing of Nova Scotia, even within the domestic Canadian market and within the important resident market, requires a sophisticated marketing mix to optimize Nova Scotia's visitor travel. This mix should combine a variety of lifestyle appeals designed specifically to suit a particular market, while at the same time realizing impact requirements for motivation and living within tight budgetary guidelines.

For example, on an annual basis since 1979, the six separate and individually identifiable campaigns listed below, have been 'spun out' of the overall advertising and promotional efforts of the Province.

1. Overall promotional event theme.
2. In-province, stay at home, move from region-to-region, stay another day, attend an attraction or event, visit a museum, and tourism awareness campaigns.
3. Newfoundland/Labrador, P.E.I. and New Brunswick campaigns.
4. French Quebec campaign.
5. Ontario and English Quebec campaigns.
6. Western Canada "new market" campaigns.

These campaigns were designed to tailor specific message appeal to the individual markets.[42]

United States Market

American motor-vehicle traffic to Nova Scotia comprises approximately 18% of the Province's total traffic. An analysis of this motor vehicle market illustrates that traffic from the New England region makes up almost half of American traffic to the Province. In this instance, the New England region includes the states of Maine, New Hampshire, Massachussetts, Rhode Island, Vermont and Connecticut with the greatest shares originating from Massachussetts, Maine and Connecticut. The second largest share of auto traffic originates from the Mid-Atlantic region comprised of New York, New Jersey and Pennsylvania in order of importance.

Other regions of the United States showing potential for Nova Scotia are the South Atlantic region, South Western region and the East North Central region. The South Atlantic region includes in order of priority, Maryland, Virginia, North Carolina, Georgia, Delaware, South Carolina, West Virginia, Alabama, Mississippi and the District of Columbia. The South Western region combines states from the Mountain, Pacific and South Central regions of the United States including the states of California, Texas, Oregon, Tennessee, Arizona, Colorado, Kentucky, Louisiana, Nevada, Oklahoma, Idaho, Arkansas, New Mexico, Utah, Montana and Wyoming. The East North Central region includes the states of Michigan, Ohio, Illinois, Indiana and Wisconsin in order of importance.[43]

In 1981, after a period of decline, overall American auto traffic increased by 9 percent. Recent increases may be due in part to the subsiding problem of gasoline shortages. As well, the Canadian dollar is presently, and is expected to continue to be greatly depreciated in comparison to United States currency.[44]

Four campaigns have been followed by the Department of Tourism in advertising geared to the U.S. Market:

1) Broad appeal advertising in magazines such as Newsweek and Time aimed at improving the Province's image awareness within the general market.
2) Targeted advertising and advetorials in U.S. specialty magazines such as Field and Stream, Americana and Early American Life geared to specific market segments.
3) Inquiry oriented advertising in U.S. newspapers promoting the use of toll-free Watts lines aimed at the New England and Mid-Atlantic Region.
4) Cooperative newsprint and magazine campaigns with carriers such as Lions Ferry and CN Marine which supply information on the ferry system and generate inquiries.

> Also a trade coop campaign on a 50/50 basis promoting packaged tours of Nova Scotia with such companies as Collette Tours, Beckham and Paragon...

The above-mentioned campaigns are designed to increase the vacationing public's awareness of Nova Scotia within the United States. They are also providing important promotion of informational access points. However, as the market and the economic situation changes so also the marketing equations must change, to meet market conditions and opportunities.

Overseas Markets

Inflation has become a global problem, and inflation rates in Europe continue to make both Canada and Nova Scotia an economical buy in vacations. To some extent, this competitive edge is being eroded by increasing air fares. However, in 1980, growth of visitors to Canada from the United Kingdom and Germany -- two of Nova Scotia's greatest potential overseas markets -- increased by approximately 7.5% and 4% respectively.[45]

Full exploitation of Nova Scotia's overseas markets has been hampered by several factors such as the lack of consumer awareness about Nova Scotia and the lack of a full-time field office in the United Kingdom. As well, the Province has suffered from a lack of direct air service from continental Europe and from limited direct air services from the U.S. In 1981, Air Canada carried flights from the United Kingdom and C.P. Air offered flights from Amsterdam to Halifax. From the United States year-round direct flights are available from Boston and flights from New York to Halifax are available during the summer season. In all cases, available flights are greatly reduced during the winter season.

Particularly in overseas markets, the United States presents stiff competition for Nova Scotia. The U.S. is perceived as having a less severe climate, a more developed product and in general, has a greater awareness in the mind of the European consumer. The cheaper air fares, greater number of international flights and gateways means that Nova Scotia would have to greatly increase its promotional efforts to benefit from this lucrative market.[46]

Nova Scotia's Future Markets

A greater sophistication in market research will aid in defining appropriate potentials for N.S. to take advantage of new opportunities in the tourism sector. Research must go hand-in-glove with marketing to allow more efficient, targeted use of promotional dollars. Provincial marketers and tourism managers in the field will require accurate, up-to-date information and advice as to "which of many potential new markets hold enough promise, by virtue of demographic, income and travel-behaviour characteristics and accessibility to Nova Scotia, to be worthwhile motivating."[47]

Travel patterns, lifestyle preferences and economic factors must all be considered. Particularly in today's economy, where real incomes in many locations are growing slowly, Nova Scotia must explore potential markets where per capita incomes are higher. Our traditional markets have shown slow-growth in real incomes while per capita incomes have been expanding in the western Canadian provinces, and in the south-west United States. In the overseas markets, Japan and Germany have shown potential for becoming important markets in this respect.[48]

Nova Scotia must increase its awareness in this type of market where incomes are rising at a faster rate and where people use a larger share of their discretionary income to travel. In addition, this becomes particularly important when we consider Nova Scotia's summer season capacities. If our plant is close to full during the high season, it would be of great advantage to be filling that plant with tourists who will be spending more vacation dollars per trip and per day during their stay.

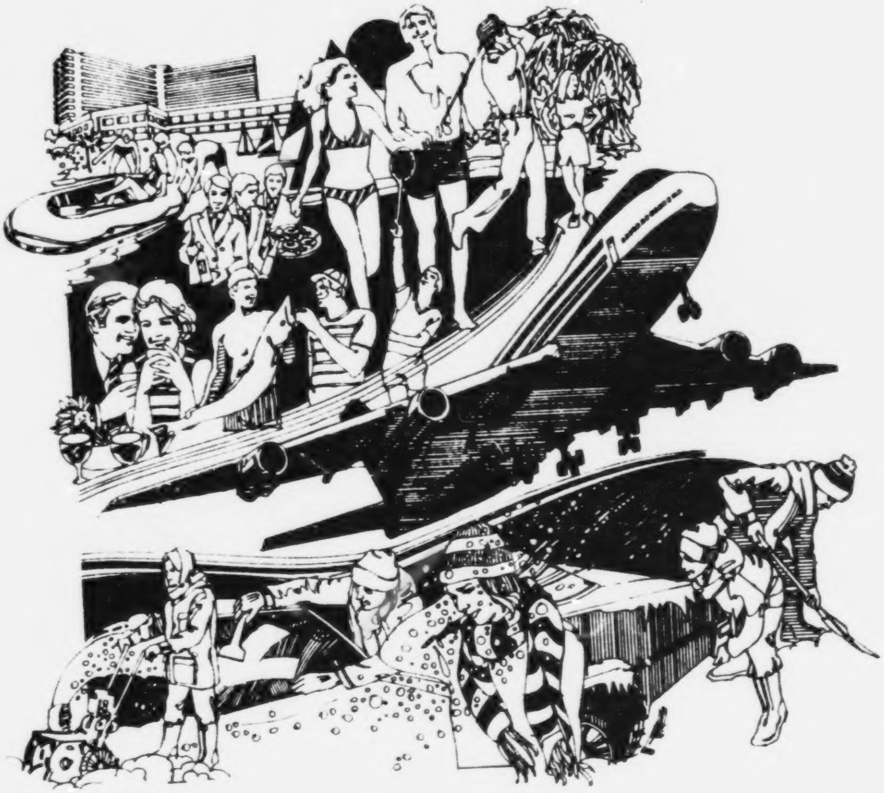
Segmentation

Here in Atlantic Canada, our competitors are also improving their attractions, accommodation facilities, personnel and marketing. They are broadening their appeal, not only to the old and young but to the active and passive vacationer, and to the short-stay and the long-stay visitor. The competition is tough and getting tougher. This is the reality of the challenge that the provincial tourism industry must meet both through product improvements and marketing programs. To make the most of advertising dollars, the Nova Scotia Department of Tourism has spearheaded advertising programs which aim at specific psychographic target-markets. The market has been segmented to appeal to the more specialized interests and lifestyles of the traveller of the 80s.

In recent marketing plans, the N.S. Department of Tourism has continued to advertise to the segment called the Comfortables which has formed the Province's traditional, family-type market. However, the marketing strategy for Nova Scotia has been expanded to include more specific groups such as Outdoor vacationers, Buffs or Hobbyists, the Restless which includes young singles, honeymooners and senior citizens, and the Activists which seek out vacations that supply tennis, golf, swimming, riding and a variety of other activities.

The European market also contains varied segments which must be approached on an individual basis. The traveller from the

United Kingdom generally comes to Nova Scotia to visit friends and relatives. German travellers look for outdoor experiences such as fishing and hunting. From France, the vacationer often has more specialized interests in history, culture and lifestyle experiences. Though these are generalizations; Nova Scotia's plant and promotion must be able to accommodate these differing package requirements if it hopes to appeal to the overseas visitor.



In general, the segmentation of the market provides a long-term marketing strategy and opportunity to direct the development and communication of Nova Scotia's tourism product to meet the demands of specific lifestyle segments of the tourist market. Because of greater competition within the industry aimed at more special-interest travellers, Nova Scotia must avoid, as much as possible, offering a homogenized travel experience indistinguishable from the competition. The Province must develop its many existing potentials with an approach that recognizes and promotes the strengths and unique characteristics of the seven regions, offering a variety of different travel experiences which will allow the Province to appeal to a wide variety of market segments in a greatly expanded season.

Packaging

Vacation packaging will become a growing element in the tourism industry involving both group packages such as the bus tour vacation and individual packages such as the fly/drive, fly/camp vacation. Package tours present an excellent opportunity to extend the tourist season, particularly for bus tours, resident travel and conventions. In fact, "off-season" rates can often be an inducement to those who package and buy tours. In each instance, the Check In system can be an excellent information and marketing tool for booking conventions and for packaging travel vacations.[49]

Vacation packaging in the 80s will have to appeal to the special interest markets and age groups discussed in the previous sections. Again, the tourist will be looking for value for the dollar. More and more, tourists will want to know the cost of their vacation prior to decision and commitment. They will seek out convenient, discounted, all-inclusive packaged vacations and will expect fulfillment of their vacation expectations.

On a provincial scale, the Department of Tourism will continue to work with the major operators and carriers, encouraging future gateways and continuing cooperative promotional efforts with such carriers as Air Canada, EPA, and CP Air, as well as with CN Marine and the Prince of Fundy Lines. Seat sales and other incentive air fares tied to pre-booked accommodation through the Check In system presents good marketing opportunities for Nova Scotia. The Department will also continue cooperative efforts with such major wholesalers to utilize their particular individual expertise to penetrate specific markets.

As well, the popularity of packaged tours has not been lost on the major carriers themselves. They are diversifying to maintain profits by developing special low fares and entering the packaged vacation markets through subsidiaries. EPA is entering this market through Your Way Holidays, Air Canada is using Touram, Via Rail has branched into Via Tours and CP Air is offering CP Air Holidays.[50]

In the 80s however, the industry itself must increase substantially the availability of packaged holidays that can be sold at point of origin. In part, this means the development of attractions and accommodations which are able to facilitate bus tours, other group tours, meetings and conventions as well as the special needs of individual packaged tours. It also means that individual operators coordinate with regional associations, attractions, and carriers to offer discounted packages, as well as assuring that package expectations are fulfilled.

In other words, individual regions and operators will have to become more involved in advertising, promotion and marketing of specialty tours for their areas. Considering the increasing competition, "marketing of packages will demand that all operators besides the wholesaler understand the market and direct their efforts towards it, and not wait for it to come to them."[51]

The present economic situation and the economic outlook for the 80s means that advertising and marketing budgets will become more and more squeezed in both the public and private domains. With the increased competition within the tourism sector, the temptation to reduce marketing budgets must be resisted if Nova Scotia is to hold its own or increase its share of the benefits of this lucrative industry. As well, individual operators will have to learn and use the skills of marketing, improve information materials, explore cooperative advertising opportunities and coordinate with other operators and attractions to make their particular area an appealing vacation destination.

Marketing Priorities

During the regional meetings, participants were asked to order three general types of marketing. While there were some differences in the ordering at the individual sessions, a distinct provincial pattern emerged from analysis of the overall ranking.[52]

a) Marketing Outside the Region

Marketing of a Tourist Region Outside the Region was clearly of highest priority and reflects the need to continue to attract more people into the Province and the individual regions. In part, this level of marketing includes marketing outside Nova Scotia on a provincial scale. Marketing the Province as a whole has been and will continue to be the mandate of the Department

of Tourism's Marketing Division. Advertising the vacation benefits of Nova Scotia to the Atlantic Region, Central and Western Canada, the United States and to overseas markets falls into this category.

While marketing the Province as an entity is clearly a priority, there was also great emphasis put on the regional need to "target market" an area outside their region. This would include marketing by a region to areas outside the Province which are particularly geared to that region's product offerings (e.g., Yarmouth Region to the New England States, Annapolis Basin area to New Brunswick).

At a regional level, this marketing category also includes the need to market a region to another region within the Province. For example, special "get away" tours on weekend packages from the Valley Region could be marketed in the Halifax-Dartmouth area. Or outdoor packages and canoe-route tours in the Eastern Shore could be promoted in the heavily populated Metro region.

All such marketing requires the regions to identify what vacation experiences are available, whom they would attract, and whether the target market is an appropriate and profitable one. Attractions and accommodations will to a large extent determine the product being sold. Demand in part is influenced by competitive pricing in the form of hotel rates, transportation availability and costs, awareness, and the characteristics of the potential market itself, such as age, income, origin, interests, etc. The process requires that an inventory of unique potential vacation benefits be taken at a regional level.

b) Marketing Within the Region

Marketing within the Region, to visitors once they have arrived or made a decision to visit a specific region was clearly a priority to the industry participants voting. During the voting process, this category was explained to mean the attempt to prolong visitation by providing more information about the region to tourists once they were in the region or were planning to come to the region.

Part of the provision of information involves the network of tourist bureaus throughout the Province. Regional and provincial information centres should be staffed by well-trained counsellors who are well-versed on their communities and areas of jurisdiction. It is important that effective and proper training time be allowed in this respect.

Several studies have been undertaken in the past to analyze the information system based on tourist bureaus. An active private/public sector committee should be remandated to assess these studies in detail and provide specific recommendations for the future.

At the regional level of marketing, the Tourist Associations have a crucial role to play. The Tourist Associations can work to improve the efficiency of Tourist Bureau networks and their ability to handle group travellers. They can encourage and coop on more effective and appealing informational brochures on each region. They can act as a catylst for information distribution to wholesalers, bus tour operators and travel writers. They can become the coordinating agent for regional festivals and specialty regional tour packages. They can act as the lobbying agent for better regional signage where required. And, the Associations can encourage operators, attractions and festival coordinators to make greater use of the Check In system of information.

Many of the Associations are already working in these areas and others, under very constrained budgets. These efforts are designed to increase the tourist's length of stay in a region and encourage repeat visitation. Competition in attracting visitors to a region will increase but each region's role is to offer unique vacation packages and experiences.

c) Local-Level Marketing

Among the three given marketing iniatives local-level marketing was described as providing promotional information on local communities and events. Although this was a third priority, it appears in the upper ranges of each regional priority list where all categories were combined.

In view of the tourism outlook for the 80s, municipalities can no longer expect the natural flow of visitors past their doorsteps. At a local level, town and community members must be educated as to the value of tourism to their area. As well, town councils must begin to or increase budgeting for the marketing and promotion of their particular communities' attractions and events. They must encourage the development of a well-rounded vacation complex built on the infrastructure of their local or area facilities and services. These municipalities must increase their efforts to develop a viable product for the tourist and to inform the tourist of this product through proper signage and sophisticated promotional literature and advertising.

Though the Associations meet at least annually with their municipalities, marketing strategies must become defined and co-ordinated at various levels. This can only be done through a formalized integrated marketing plan at both the town and regional and the regional/provincial levels. It is suggested that towns or municipalities and then municipalities/regions develop their own annual marketing plans, with the inclusion and leadership of their local private sectors. These plans should reflect the priorization given each category at the ranking session. Budgets should be developed by pooling local private sector, municipal, county and regional dollars.

Regional Marketing Plans should be submitted to the Department of Tourism so that the aims and objectives of each region can be more easily assessed on a provincial scale. Ultimately this process would lead to more regional integration with the annual provincial marketing strategy to reach the desired traffic/length of stay objectives.

Plans on both a town/municipal and regional level might resemble the general format below:

Regional/Municipal Marketing Plan

Part I: Executive Summary:

(A capsulization of findings, potentials and recommendations based on the analysis in Part II).

Part II: 1. Market Situation Reports:

(Reports on research statistics and analysis of person volumes, modes of travel patterns, visitor trends and preferences, etc. at each of the following levels).

a)Provincial
b)Regional
c)Municipal/Local

2. Problems and Opportunities

3. Tourism Marketing Strategies

(Each topic should attempt to assess past performance, future objectives, perceived problems, possible opportunities and suggested strategy alternatives).

a) Overview of Promotional Activities
b) Tourism Organization and Associations
c) Budget
d) Market Development
e) Travel Trade/Packaging
f) Pricing
g) Attractions and Events
h) Lifestyle Segmentation Potentials
i) Research Requirements
j) Tourism Awareness
k) Publicity
l) Fam Tours
m) Films and Audio Visuals
n) Promotional Items and Themes
o) Literature Production and Distribution
p) Signage
q) Advertising
r) Product Development
s) Plant Development

The format above is a modification of the format of the annual provincial marketing plan which provides strategy direction through an assessment of past performances, current trends and possible potentialities for each element of the marketing mix. Within this format, marketing in general should not be viewed as an activity separate from planning and plant development. In specific instances any plant development must include strategies for promotion and maintenance to become viable and productive.

Summary and Prioritization

The three Marketing sub-categories were essentially arbitrary divisions used during the regional voting sessions. As with the four sub-categories under Management and Training, these divisions are not as concrete in real life, but are interchangeable and interdependent. Due to the importance and interdependence of developing all Marketing and Management and Training sub-categories simultaneously, it has been suggested that these arbitrary divisions be removed.

In addition, the basic nature of Marketing and Management and Training requirements is substantially different from the requirements involved in capital projects, making a comparison difficult. We should not fall behind in developing our tourism plant, however, if the plant is not promoted and serviced properly, the accrued benefits will be greatly below potential. In this circumstance, it was viewed that all categories under Management and Training and Marketing receive top priority provincially and across the seven tourist regions. The later chapter on "Regional Priorities" will reflect this emphasis.

Marketing Organizational Proposals

During the meetings with the Tourist Associations, two proposals dealt with the establishment of new tourist organizations. The new organizations would be designed to obtain a fairer or more efficient geographical representation within the regions concerned.

Gateway Region

In the Yarmouth/Argyle meeting, the highest priority among all categories was given to the creation of a Gateway Region. The new region would include the Town of Yarmouth and the Municipalities of Clare, Yarmouth and Argyle, to alleviate the problem of this area being split between two other regional tourist associations.

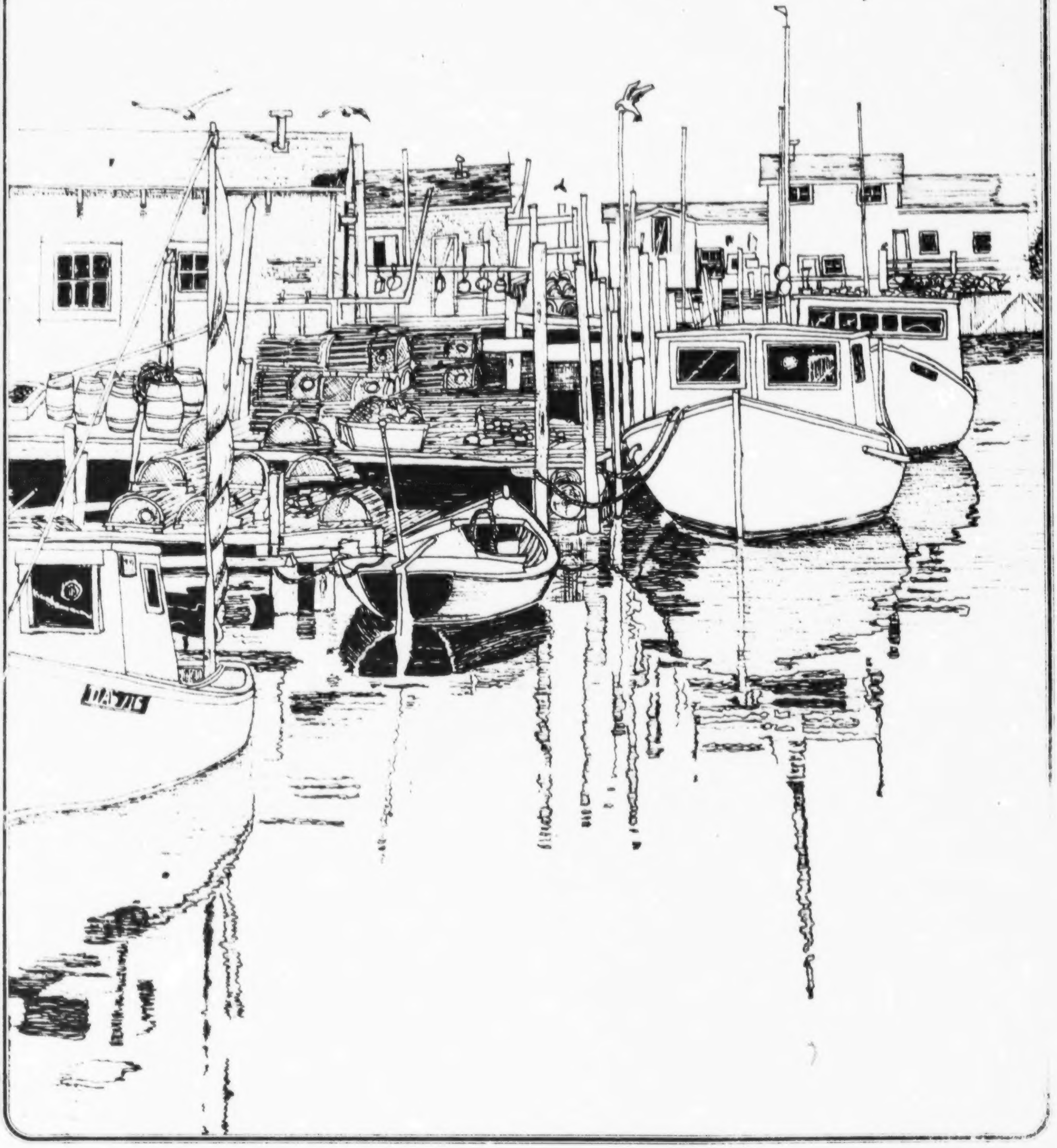
The representatives from Yarmouth/Argyle unanimously insisted that this proposal for a new region be placed on top of the list and that all other proposals be ranked beneath it. However, while the Yarmouth County Tourist Association wishes to include the District of Clare in the new region, representatives from Clare were not so confirmed. During the Annapolis Valley regional meeting, participants from the Clare District indicated that they strongly wished to retain the affiliation with the Annapolis Valley Affiliated Boards of Trade.

Halifax-Dartmouth Regional Tourism Association

A second organizational proposal involved the setting up of a Halifax-Dartmouth Regional Tourism Association. This Association would market and administrate over the entire region but would not preclude the efforts done by the individual cities and towns.

During the Halifax-Dartmouth ranking session, this proposal received only a mid-range priority. Perhaps fulfillment of the Halifax/Dartmouth Regional Festival, which received the second-highest priority ranking, will illustrate the need for a truly regional coordinating body in the future.

Destination Attractions



Destination Attractions

As the tourist has adapted to changes in the marketplace, so must the design of the vacation environment. One adaptation is the building or enhancing of destination complexes or zones where tourist activities and facilities are grouped in a geographic area reducing the transportation costs of the traveller. "A grouping would contain a number of different products and services to satisfy a range of needs, interests and activities".[53]

Thus, the destination complex or vacation cluster should include such basics as information facilities, transportation access, accommodation and food service. As well, to round out the vacation experience, destination attractions, events, entertainment, recreation, and shopping should also be contained within the complex or nearby. Using this definition, a vacation cluster could mean a self-contained unit, such as a well-developed resort, or it could be a town or area which combines vacation amenities with things to do and see.

The majority of the proposals receiving high priority during the assessment process held throughout the Province fall into this category. The proposals selected are designed to enhance or improve already existing attraction bases. Or, the proposals add to existing vacation infrastructures making them destination attractions.

The table on the following page, is drawn from the Consultants' report and defines by region the types of highest priority regional attractions selected; however, the classifications are not in any priority order. Each proposal will be briefly discussed as it relates to the vacation cluster idea. Information and transportation proposals derived from the meetings will also be discussed in this section.

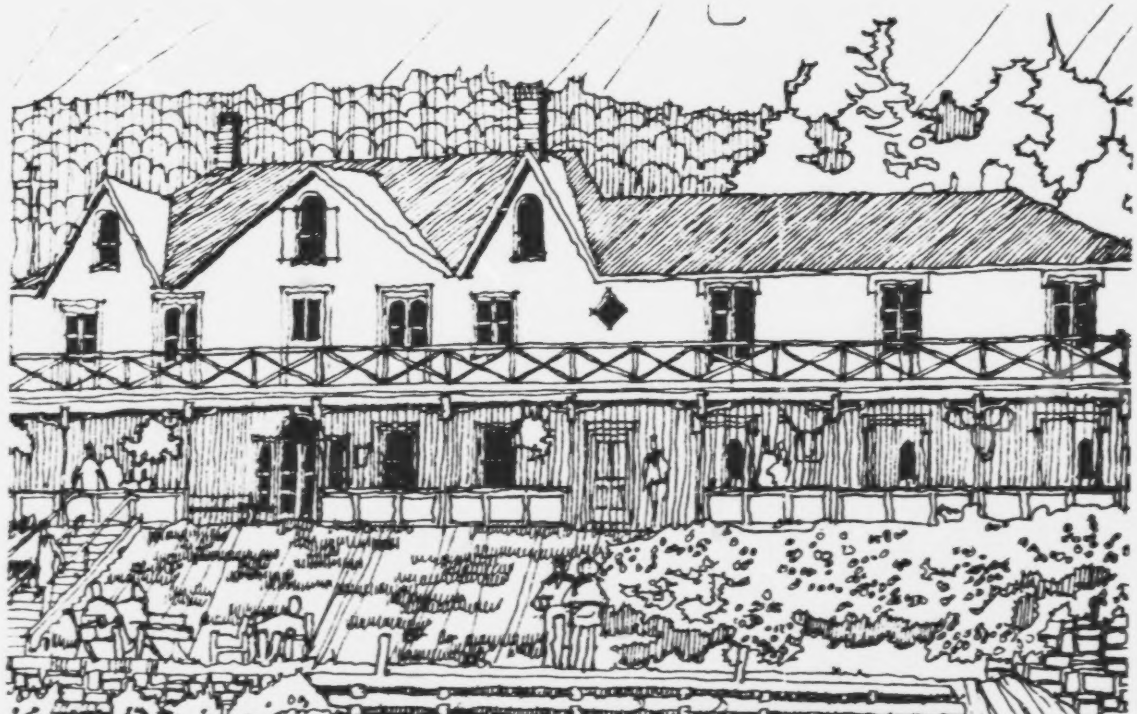


TABLE I

Types of Highest Priority Regional Attractions

	Annapolis Valley	Cape Breton	Eastern Shore	Fundy Shore	Halifax - Dartmouth	Northumberland Shore			South Shore	Yarmouth/ Argyle
						Cumb./Col.	Pictou	Antigonish		
Boating	Boating	Bras d'Or Boating	-	-	Dartmouth Marina	-	Pictou Waterfront	-	-	Boating
Festivals	-	-	-	-	Fall Regional Festival	Regional Resources Festival	-	-	-	-
Historic	Historic Gardens	-	Sherbrooke Village Grassy Island	Ottawa House	-	-	Museum of Transportation and Industry	Antigonish Museum	Haulover	Cape Forchu Museum
Natural Environment	-	Margaree Wildfowl Preserve	Salmon Centre Gold Mining Centre	Hayes Cave Tidal Interp. Joggins Fossil Cliffs	-	-	-	-	-	-
Outdoor Recreation	-	-	Beaches Seaside Park System	Falls	-	Beaches Drysdale Falls	Beach	Beach Day-Use Beaches	Beaches Trails Coastal Parks Carter's Beach	Tusket Island Park
Themes	New France	Acadian Fishing Village	-	-	-	Ship Railway				New France
Urban	Kings Theatre		Sheet Harbour Visitor Centre	-	World Trade Centre	-	Trenton Park		Shelburne Cox W/house Barrington Core	-

Types of Highest Priority Regional Attractions

a) Boating

One of Nova Scotia's greatest assets is its coastline and nearness to the sea. Our coastline, acre for acre is one of the highest producing areas of the Province, but in the tourism sector, this resource has been greatly underutilized.

A marketing survey completed for the Atlantic Canada Tourism Program revealed that "the principle appeal of the region is the Maritime scenery and the way of life."[54] This result puts particular emphasis on providing access to Nova Scotia's inland waterways and coastal territories for boaters, fishermen, outdoor enthusiasts and tourists in general. Boating opportunities as defined during the voting process included the provision for wharf facilities, marina facilities, boat rentals and charter services. In four areas, the Annapolis Valley, Cape Breton, Dartmouth, Northumberland Shore (Pictou) and in the Yarmouth/Argyle areas, the improvements of boating facilities ranked high.

The Dartmouth Marina and the further improvement of boating facilities in Pictou will provide greater accessibility to the waterfront in these communities. They will complement and add to the existing tourism infrastructure of restaurants, accommodation and entertainment already contained within these locations.

During the voting process, boating opportunities within the Annapolis Valley, Yarmouth/Argyle and on the Bras d'Or Lakes in Cape Breton were given high priority. In these areas, however, either several locations were suggested or the need for boating facilities was left general due to the numerous opportunities available in the region and private ownership considerations.

For the determination of specific sites, this report recommends that marina, wharf and charter facilities be built within existing tourism infrastructures or near present vacation clusters.

b) Beaches

Another type of proposal which relies heavily on access to Nova Scotia's waterways and coastlines falls under the Outdoor Recreation category, namely Beaches. Particularly in the Eastern Shore, Northumberland Shore and South Shore regions, this type of proposal received high priority.

As with boating facilities, beaches within Nova Scotia are on the whole an underdeveloped natural resource. For the Northumberland Shore region which includes Cumberland/ Colchester, Pictou and Antigonish counties, this problem is especially crucial. Beaches in this region require the basic development of access routes, general cleanup, lifeguard and washroom facilities. This type of development is required immediately before private ownership takes over the prime territories and before the price of land proves development unfeasible or delicate sand dune environments become destroyed.

Containing the warmest beach areas in the Province, the Northumberland Shore region also requires some major beach developments on a recreational scale. This type of beach development would require provisions for access, parking, washrooms, showers, management, maintenance and supervision. As well, the development should have a beach activity centre which might include such things as a restaurant, recreation hall, ampitheatre, decks, tennis courts, miniature golf and coastal-hiking trails.

In the Eastern Shore region, similar beach developments are recommended both on a day-use beach scale and a recreational beach scale. The continued development of the Eastern Shore Seaside Parks System also received high priority support during the voting process. This proposal dealt with the further developments required at Clam Harbour Provincial Park, Taylor Head Provincial Park and Lake Charlotte Park Reserve. Development of interpretive themes based on the natural history and geology of the parks, completion of park campgrounds, and development of recreational activity facilities are some of the elements involved in this proposal. The Seaside Parks System can be developed into a major destination attraction blending resource oriented recreation with enjoyment and preservation of the environment.

In the South Shore region, emphasis was also laid on beach development with several possible locations being named, but with the Carter's Beach area proposal receiving particular stress. In addition, the South Shore representatives stressed the need for the development of coastal parks particularly on Coffin Island, Tancook Island and in Blue Rocks. These parks would require provision of parking space, landscaping and improved access.

The recommended beach developments and boating opportunities attempt to deliver to the tourist the promise of the Province's advertising of, "There's So Much to Sea." In all regions where major beach developments were specified, these should rely on an accommodation base presently provided by nearby towns, or should include provisions for the building of campgrounds and cottage units where feasible to round out the beach experience and increase the length of stay in the area.

c) Historic/Cultural Attractions

Today's tourist is better educated and more sophisticated in the type of activities he seeks. The traveller of the 80s looks for self-gratification and self-enlightenment from his vacation, "seeking recreation alternatives for himself and the family that offer something that is unique and worthwhile to them as individuals."[55]

The historical/cultural attraction is particularly geared to this type of traveller. In museums and historical sites, tourists can rediscover their heritage or explore the culture of the area they are visiting. They can learn the background of the people of the Province and return home with a better understanding of a way of life other than their own.

Package vacations rely heavily on this type of attraction. The 1976 Bus Tour Survey revealed that the number one activity of motorcoach travellers in Nova Scotia was visiting museums/historical/cultural sites.[56]

Attractions and attraction development are important to the tourism industry whether historical or cultural in nature or not. However, in any incentive program for attractions, it should be remembered that the more discerning tourists of the eighties are looking for a vacation 'experience'. As well, "package tour operators sell the promise of an experience, not simply the idea of touring."[57] In Nova Scotia, we should reanalyze our attraction base to provide more direct cultural contacts with the people and to recreate a "living" history to enrich the lives of resident and non-resident visitors.

Many of the attraction development proposals receiving top priority in the regions are based on the enhancing of, or building of destination attractions with a historical/cultural theme to appeal to a variety of interests. The Acadian culture and a wide spectrum of past industries of the Province make up the bulk of the proposals selected.

i) Gold Mining

The history of the gold mining industry received a very high rating in the Eastern Shore region. One proposal calls for the telling of "Golden Age" of the Eastern Shore and the Moose River Gold Mine Disaster, through the development of a Gold Mining Centre, in the area where gold was first discovered in the Province, which would complement the Seaside Parks System. Further enhancements were also proposed for Sherbrooke Village to combine its gold mining theme with a shipbuilding theme and a river interpretation display. A ferry service and wharf connections between the various areas of the Village were also recommended. Direct duplication in gold mining presentations should be avoided between these two Eastern Shore proposals.

ii) Fishing

For the fishing industry, proposals in several regions were recommended. In the Eastern Shore region, support for Parks Canada with regard to the designated Historic Park at Grassy Island was ranked high. This area was significant as a fishing centre during Champlain's time. As well, on the Eastern Shore, the development of the St. Mary's Salmon Centre received high priority. This Centre is designed to tell the history and legends of the many salmon fishing rivers of the Eastern Shore through exhibits and demonstrations. A research exhibit would also allow visitors to view the growth cycle of the salmon from the egg to 10-15 pounds in weight. The site proposed is across the St.

Mary's River from Sherbrooke Village and should be linked up with the Village through the ferry service mentioned previously.

Another project dealing with fishing is the proposal to reconstruct a fishing village at the Haulover, as part of the restored Harbour on the Blanche Penninsula in Shelburne County. This summer fishing village would combine interpretive displays with demonstrations of fish-drying and net-making. A reception centre sales area, parking, picnic area, foot bridge, trails, overlooking decks, buildings and wharf restoration would combine to round out the complex. The accommodation base for such a project would utilize the facilities in nearby Barrington Passage and Shelburne.

Also related to the fishing industry and Nova Scotia's seafaring way of life, is the Tidal Interpretation proposal which received high priority in the Fundy Shore region. This region is famous for its high tides but little information is supplied to the tourists in this respect. The proposal for this region calls for a two-phase project. The first phase involves increased interpretive displays regarding the tides of the Bay of Fundy as well as an observation station and panels at Economy Point. To further capitalize on the future tidal power site, the second phase of development would include the construction of a major tourist complex consisting of accommodations, an information centre, scale models and a park.

In the Yarmouth/Argyle area, the establishment of a small museum on Cape Forchu at Yarmouth received a high ranking. The Cape Forchu Lighthouse Museum would be designed to tell the story of lighthouses in Nova Scotia, as an interesting element in the Province's fishing and shipping industry.

iii) Industry and Transportation

Two other major proposals which were given a high priority by the Northumberland Shore region were based on industry and transportation. One of these projects deals with the potential of the Chignecto Ship Railway in the Amherst area.

The Chignecto Ship Railway began in 1882 and was intended to move ships by dual locomotives on double tracks, across the 17-mile Isthmus of Chignecto between Tidnish and Fort Lawrence. Due to costs involved, a complete reconstruction is impossible, but the proposal calls for a restoration of a portion of the railbed adjacent to the Amherst Border Entry point, where it would be easily accessible by both car and bus. The project is designed to detain in the area some of the 78% auto and 29% bus traffic passing through the Amherst/Tidnish entry points.[58] The project calls for actual-size road bed, locomotives, flat cars and mast to be erected with sheltered observation decks and interpretative exhibits. Interpretative displays should include not only the history of the Railway, but should also tell the tourist more about the area to encourage the exploration of the region more thoroughly.

The other proposal for the Northumberland Shore takes advantage of the built-up areas of New Glasgow, Trenton, Stellarton, Westville and Pictou. In this area, the Nova Scotia Museum is interested in establishing a large-scale Museum of Industry and Transportation just off the 100 series highway at the Stellarton, Foord Street Exit, which would act as an attraction of national and international importance. The Museum would be designed to hold such large exhibits as railway cars, steam engines, early road vehicles and manufacturing machinery. The project would also contain an administrative area, lecture theatre, library, cafeteria and washrooms. It should also be noted that the property is adjacent to the remains of the Cornish Pumphouse, which today is the only visible evidence of where the Foord Pit was located.

iv) Cultural Museums

The Northumberland Shore region (Antigonish) also ranked the establishment of an Antigonish Museum high amongst its priorities. The museum would be run by the Heritage Society of Antigonish and would be a highland heritage museum.

The attractions discussed above have certain elements in common in that they are all designed to increase the length of stay of the tourist in a region or area. They complement already existing attractions and travel infrastructures. As well, they preserve the social and cultural heritage of the Province for Nova Scotians themselves.

v) Theme Parks

The notion of preserving Nova Scotian social and cultural heritage is very important when discussing theme parks. The Province does not need to build a Disneyland to create a viable theme park for vacationers. Such parks should be based on themes which are indigenous to the character and heritage of Nova Scotians.

During the consulting and voting process, two major theme parks were proposed again based on a historical theme. One proposal in the Cape Breton region supported the idea of recreating an authentic eighteenth century fishing village on Isle Madame. The first commercial fish plant in the area was established in 1765. Prior to this, the fishing communities of Isle Madame serviced the fortress of Louisbourg before to its fall to the British. During the U.S. War of Independence, American forces burned and looted several of the fishing stations in the area. Many of the French fishermen were deported to France, but some eventually returned to re-establish their fishing operations.

The village would stress Acadian culture and cuisine, cater to bus tours and encourage bed and breakfast development. The Isle Madame proposal is now undergoing a feasibility study by La Societe Historic Acadienne de L'Isle Madame, funded by the Secretary of State, Government of Canada.

Another theme park, ranked high by both the Annapolis Valley region and the Yarmouth/Argyle area called for the reconstruction of a lumbering village in New France. The lumbering business was the mainstay of the provincial economy at the turn of the century. The New France community was founded in 1893 by the Stehelin family following emigration after the Franco-Prussian War. The reconstructed village would show the impact of the forestry industry on the area and province. It would also contain a working sawmill, cook house, clubhouse, forge, blacksmith shop, eating facilities and recreational hall and other recreational facilities. The New France project is designed to be a year round, activity-oriented park appealing to both individual tourists and bus groups.

The New France project received a high ranking from these regions due to the need for a major attraction in the area to better utilize the accommodation and service facilities provided by towns on the French Shore; Digby and Yarmouth.

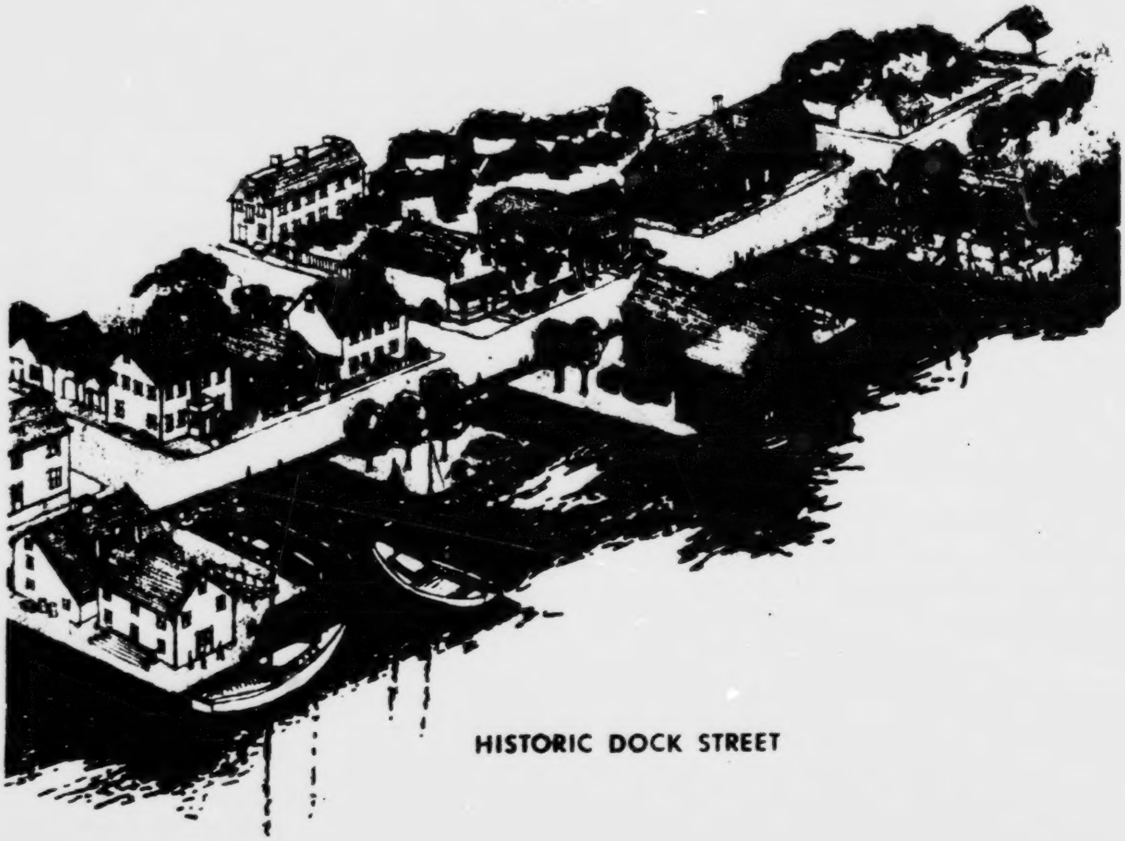
Such theme park proposals are also designed to attempt to affect one of Nova Scotia's major problems, namely, seasonality. Though travel has increased in some of the shoulder season months such as May, September and October, the Province lacks attractions that are open year-round on a regular basis, which provide activities in all seasons for both resident and non-resident travellers.

d) Urban-Based Attractions

Attractions which are urban based are designed to better enhance the towns or cities as destination areas. The Annapolis Valley region voted high priority to the development of King's Theatre in Annapolis Royal into an bilingual, cultural theatre with international appeal. This region also voted for continued support of the Historic Gardens in Annapolis Royal to realize its potential as a major attraction to the area.

In Pictou County, the further development of the Steeltown Centennial Park in Trenton was supported. This park is designed to become a year-round recreation facility, suitable for a variety of festivals and activities.

In the South Shore region, the development of Shelburne's waterfront received considerable support. Shelburne is an extremely picturesque town which has been seriously underdeveloped to date. The renovation of Dock Street and the reconstruction of Cox Warehouse into a reception/craft centre was highly recommended. Other phases of the project include the provision of a marina and marketplace for the waterfront.



HISTORIC DOCK STREET

Also in the South Shore, a proposal to improve and link up the various attractions in the Barrington Core area received a high priority ranking by the participants. This proposal calls for the provision of parks, walkways and expanded parking facilities. Also involved is the recommendation to provide interior displays and a picnic area for the Lighthouse Museum, improvement of the Woolen Mill entrance. As well, renovations, exhibits and site enhancement for the Old Courthouse and renovations to the Post Office to serve as a new tourist bureau were recommended.

The Halifax-Dartmouth region expressed their utmost support for the building of a World Trade Centre proposed for downtown Halifax adjacent to the present Metro Centre. The Trade Centre would include a convention facility to better accommodate the increasing numbers of local, national and international conventions, trade shows and developmental industry exhibits coming into the Metro area. It has been estimated that the World Trade Centre will attract over 450,000 attendees per year.

The convention delegate is a unique type of traveller as they spend more per day than the general tourist.[59] The delegate has unique needs and this market shows great potential for the further development of pre and post-convention tours, activities and mini-vacations. The Halifax-Dartmouth region, as well as voting the proposal of a World Trade/Convention Centre as number one, highly recommended that a research and economic impact study be done on the convention delegate as different from the general business traveller or tourist, to better assess the plant requirements of this market.

e) Festivals & Events

One of the methods of enhancing existing destination infrastructures is to provide annual event and festival attractions; an "experience" that attempts to meet the changing activity and interest demands of the tourist. Events should be encouraged, which are typical of Nova Scotian culture. Two event proposals received particular attention during the voting process.

The first Regional Festival proposed was for the Halifax-Dartmouth region. This proposal called for the development of an annual international festival to incorporate a variety of themes such as the fiddlers, Joseph Howe festival and the Bluenose. The festival would be aimed at increasing visitation in the fall when the occupancy rates in the Metro region are reduced.

The second proposal receiving support in the Amherst Tatamagouche section of the Northumberland Shore, called for the development of a Regional Harvest Festival for the Oxford/Collingwood/Wentworth area. Under the harvest theme, it is recommended that theme festivals be developed around the harvesting of blueberries, strawberries and maple syrup. A second part of this proposal, called for the construction of over 1,000 miles of hiking, snowmobile and cross-country ski trails in the Collingwood area to make the area a year-round destination.

f) Outdoor Recreation and Natural Environment

Perhaps more than any other industry, "the tourist industry is the one which most directly depends on unspoiled natural environments."[60] For outdoor enthusiasts and resident Nova Scotians, the preservation of unique natural environments is essential.

Several of the proposals receiving a top priority ranking by certain regions deal with the preservation and management of natural environmental areas as controlled tourist attractions. Particularly in the Fundy Region, both the Hayes Cave and the Joggins Fossil Cliff proposals received high priority. Development and proper management of such sites would involve the Department of Lands and Forests and the Nova Scotia Museum. The Nova Scotia Museum is responsible for implementing the Special

Places Act (1980) which is designed to protect ecological, palaeontological and archeological sites for future Nova Scotians. The region expressed concern that the two sites mentioned required immediate attention before the areas become dispoiled through abuse.

At Hayes Cave, off Route 236 along the Five Miles River, protection of the delicate eco-system was recommended through the development of a Natural Environment Park, with interpretive facilities for the Cave system, flora and fauna of the area. Special controlled walkways and day-use areas, as well as guided tours for vacationers and school groups, were included in the proposal.

The Fossil Cliffs from Coal Mine Point to Lower Cove north of Joggins are world famous for the everchanging fossil trees which are often visible during low tide. The Joggins Fossil Cliffs proposal specified the upgrading of the access road to the site, landscaping, picnic tables and the construction of steps leading down the cliff. In addition, the proposal recommended provision of a small interpretative centre to be combined with a tea room and gift shop.

The Fundy Shore representatives also supported a smaller scale project involving the development of a waterfall trail system along the Chignecto Ridge. The trails would facilitate viewing of the various natural falls in the area.

In the Cape Breton region, the proposal to develop a wildfowl preserve at the estuary of the Margaree River received a high ranking. The Margaree area is a very attractive part of the Cabot Trail and contains some excellent accommodations. The establishment of a wildfowl preserve would serve to strengthen the attractiveness of this area, appealing to children, bird watchers and outdoor enthusiasts.

The development of a Tusket Islands Park received a high vote from the Yarmouth/Argyle area representatives. Particularly proposed, was the development of this area into a Natural Environment Park to allow environmentalists and other visitors to view this area of unique geography, without damaging the eco-system of the reserve.

As well, the Amherst/Tatamagouche area of the Northumberland Shore ranked the further development of Drysdale Falls as a high priority. This 2 1/2 acre wooded property is located approximately three miles from Tatamagouche. The project includes upgrading of the parking area, viewing platforms, reconstruction of steps and provision for hiking trails and ongoing site maintenance.

All of these Outdoor Recreation and Environment proposals as well as the Beach Development proposals involve intensive public sector involvement. Major interdepartmental input and cooperation will be required to define in detail the parameters of location, land acquisition management and feasibility of each proposal.

g) Specific Accommodation Projects

Certain specific accommodation proposals were ranked high in the Halifax-Dartmouth and Fundy Shore regions. Due to the large capital and potential investment involved in these projects, they have been included with proposals in the Destination Attraction section for they tend to enhance and round-out the particular vacation cluster involved.

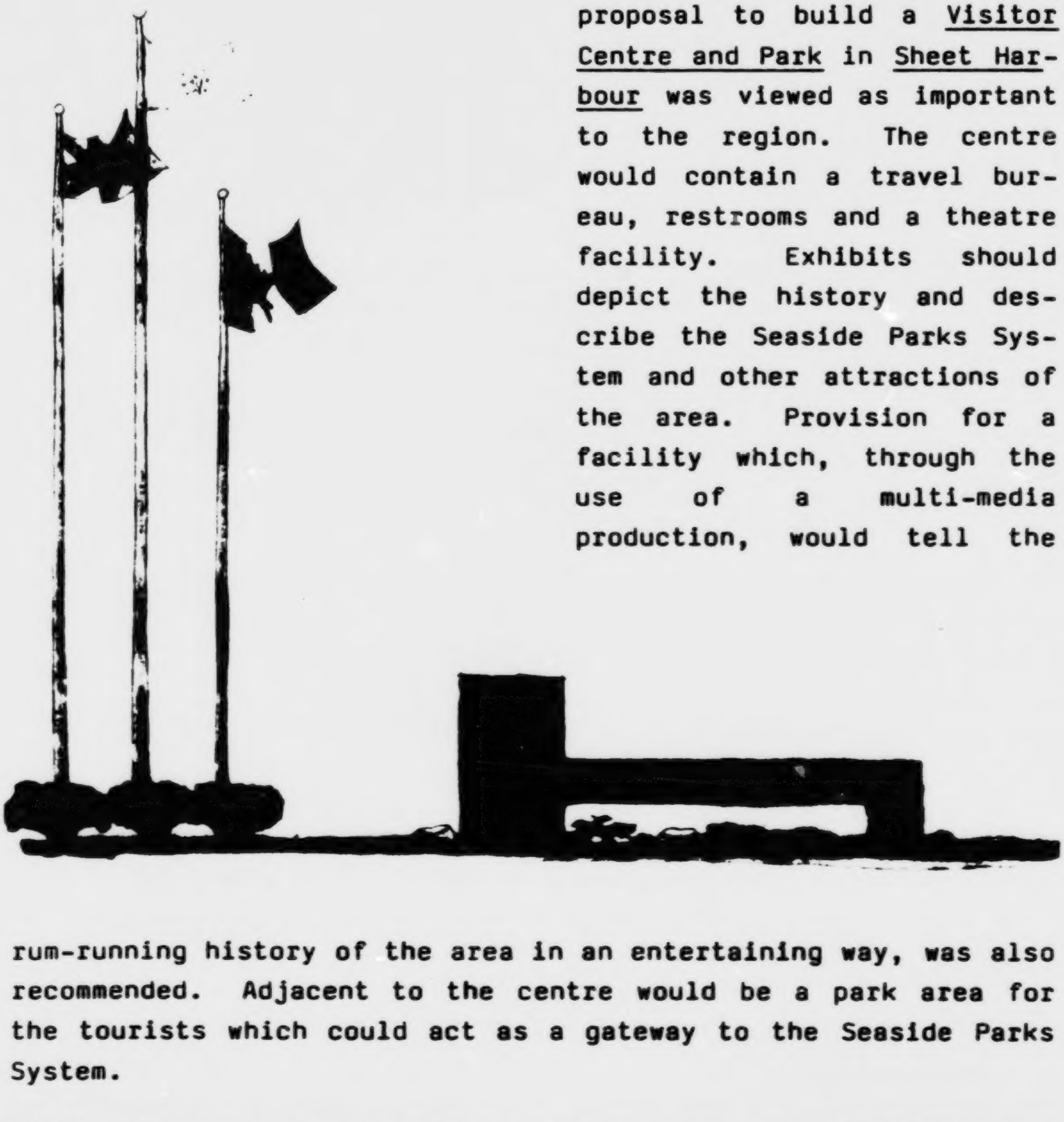
In the Fundy Shore region, the development of Ottawa House was given high priority. Ottawa House, located in Parrsboro, has the potential to be developed as an elegant Country Inn, complete with nineteenth century double-level verandah, parasols,lawn bowling and rowing skiffs. As a Country Inn, this structure would not only provide the area with a unique accommodation facility, the Inn itself could become an attraction based on the charm and elegance of the Confederation and Shipbuilding era, thereby strengthening the tourist draw of Parrsboro.

As well, a major hotel facility for Dartmouth received strong support in the Metro region. The proposal calls for the encouragement of a private sector investment opportunity to take advantage of the waterfront vistas, shopping and transportation links afforded by downtown Dartmouth. The project is also designed to increase Dartmouth's share of the large Metro accommodation market.

h) Information and Transportation Proposals

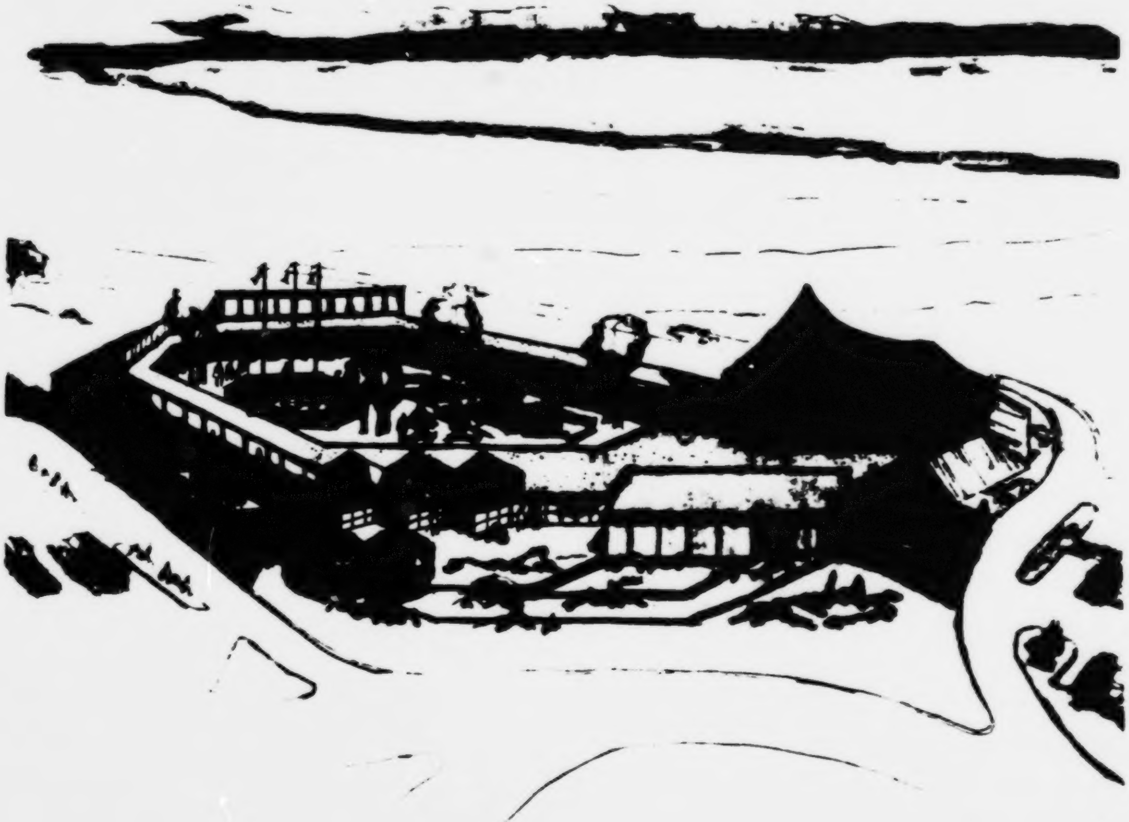
An essential part of tourism is based on transportation. In fact, "a major portion of tourism expenditures and, for certain travellers, a significant amount of vacation time are related to transportation."[61] Internally, under transportation, priority must be given to proposals which aid in the linking up of a network of destination attractions which support and reinforce each other, thereby strengthening overall tourism at a regional and provincial level.[62]

Signage is another important issue in transportation. Signage which properly guides the tourists to discover new areas or routes, increasing their awareness of an area, is essential to lessen the pass-through traffic in a region. Several of the proposals under destination attractions which received a high ranking in the regional priority assessment sessions dealt with informational or en route amenity proposals.



In the Eastern Shore, a major proposal to build a Visitor Centre and Park in Sheet Harbour was viewed as important to the region. The centre would contain a travel bureau, restrooms and a theatre facility. Exhibits should depict the history and describe the Seaside Parks System and other attractions of the area. Provision for a facility which, through the use of a multi-media production, would tell the rum-running history of the area in an entertaining way, was also recommended. Adjacent to the centre would be a park area for the tourists which could act as a gateway to the Seaside Parks System.

Within the Northumberland Shore Region, further landscaping and raised signage was viewed as important for the Antigonish gateway to the region. In addition, the Antigonish area expressed the need for additional parking required to allow the visitor to explore the picturesque fishing village of Ballantynes Cove. Also in the Northumberland Shore Region, the Amherst-Tatamagouche representatives gave the Sunrise Trail Entrance Treatment a high priority. This proposal calls for the enhancement of the Sunrise Trail entrance with signage, landscaping and lighting at La Planche Street in Amherst. Priority was also given by the area to the proposal to expand



the Sunrise Trail to incorporate Route 366 from Amherst.

Improvement of the Amherst Entry Point was also viewed as important by this region. Besides work on the grounds, the proposal called for renovations to the tourist bureau and relocation of the gift shop building to the north side of the centre. Also involved was the establishment of an exhibition building of Nova Scotian products, a service building to provide improved public washrooms, walkways, terraces, amphitheatre, play area and improved signage and graphics.

The Cape Breton region also viewed proper entry point treatment as important. Upon review, the Cape Breton Tourist Association requested that the Auld's Cove access point proposal be given priority among the top ten projects for the region.

This proposal is designed to improve the visitors first impression of Cape Breton and provide a regional information system terminal. Upgrading of the physical appearance of the Canso Causeway and surrounding area was called for. As well, it was recommended that a tourist bureau be established which would alleviate some of the congestion at Port Hastings and which could act as a shared information resource for both the Northumberland and Eastern Shore regions.

The number one transportation project ranked by the Fundy Shore Region called for the paving of Route 9 from Joggins to Apple River. The paving would extend the Glooscap Trail and provide the visitor with an interesting, continuous coastal route.

In the Halifax-Dartmouth Region, priority was given to the proposal that a major Parking and Transportation Volume Study be undertaken for the Metro area. Particularly in view of the number of proposed construction projects and increased bus traffic in downtown Halifax, this type of study was considered crucial.

Relocation of the Lunenburg Tourist Bureau to provide more parking and a pedestrian link to the Fisheries Museum was an informational proposal which was ranked high in the South Shore region. A second element of this proposal called for the conversion of the Chester Railway Station to a tourist resource centre with emphasis on local history.

Those specific transportation projects which received a mid-range priority ranking included improvements to parking and access at Peggy's Cove, special tourism mapping on reverse side of provincial highway map, the Port Hood to Souris (P.E.I.) ferry connection, and completion of the Fleur-de-Lis Trail in Cape Breton, a pulp and paper theme pull-off at Abercrombie in Pictou County and the improvement of cruise ship docking facilities in Yarmouth.

On a general provincial level, three transportation proposals were ranked by each region. The highest ranked proposal included the provision for rest stop/day-use areas at regular intervals along the major travelways. Example provisions might include washrooms, picnic areas and information facilities. Where possible, these stations should be located on sites with an interesting, scenic view yet where competition with nearby private facilities would be minimized.

In many instances, the provision of adequate rest stations might only require the upgrading of existing look-off or day-use areas. In other instances additional signage to indicate day-use facilities provided by present government parks might only be required.

In either case, an inventory should be undertaken of present day-use areas and the condition of existing sites which hold potential as rest stations, through minor enhancements. This procedure would quickly indicate what areas are in need of new rest station development. Such a study should also review the present policy which restricts access to rest stations to existing exit or interchange points.

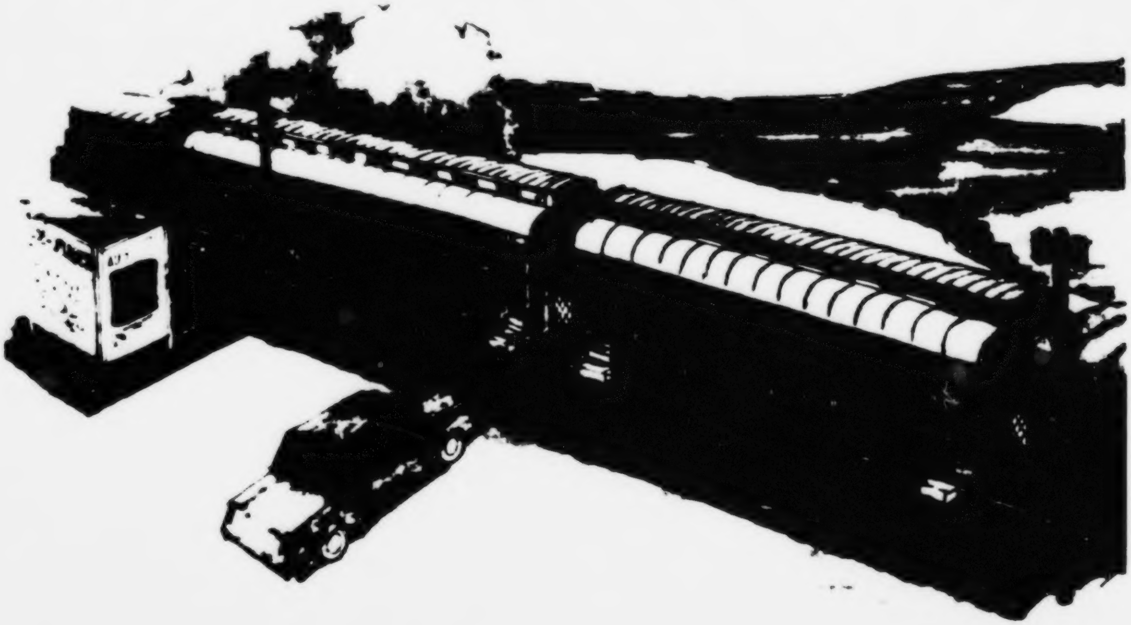
The proposal for the establishment of a mini-van system to assist the special-interest vacationer received a mid-range to low priority ranking. The pick-up and drop-off service would cater to those wishing transportation to fishing, hiking, canoeing or sailing areas. As well, this mode of travel could also provide mini-tours of unique cultural areas, as well as link air and train travellers with accommodation facilities.

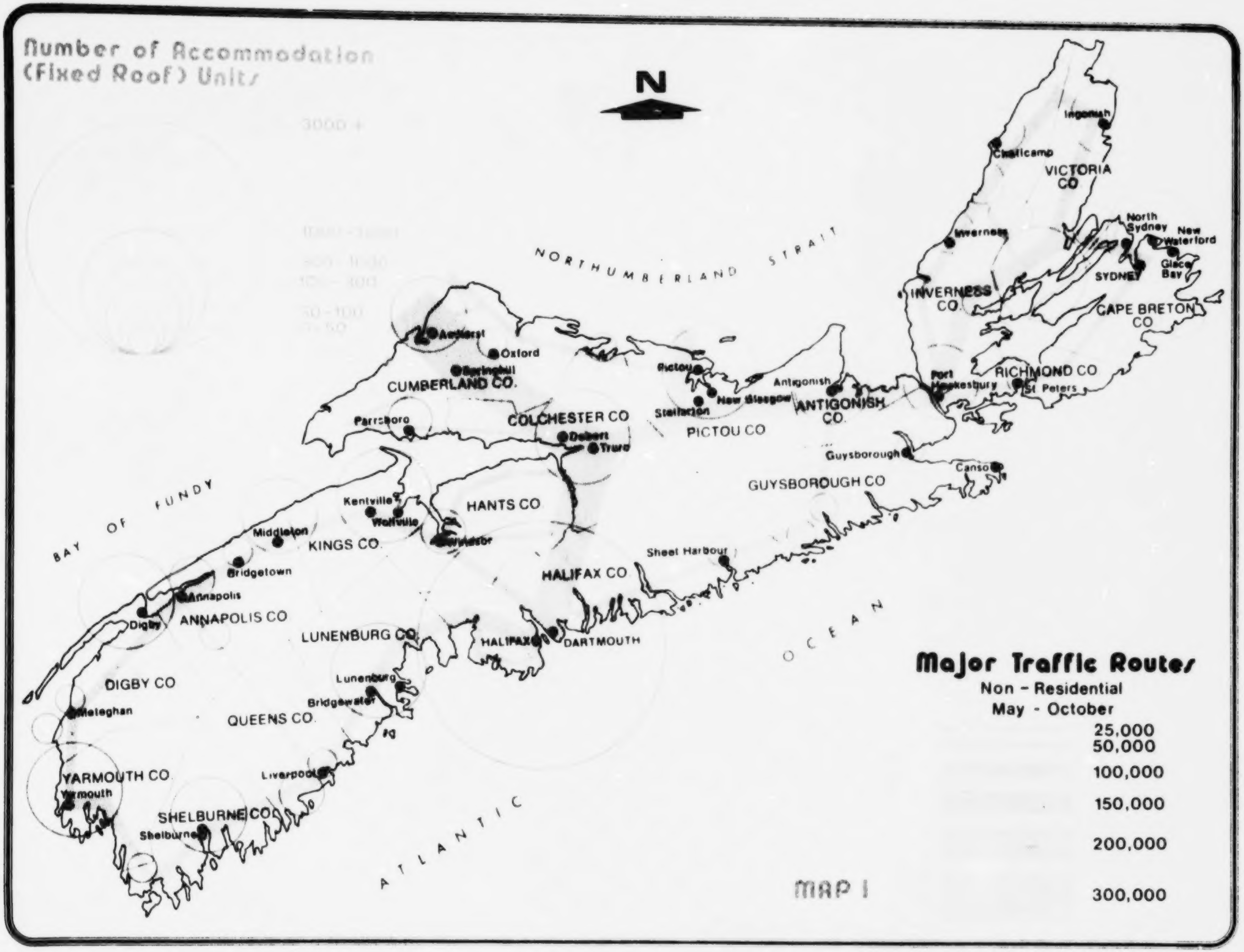
The third proposal, called for the adoption of a signage system to advertise local events on the 100 series highway. With the exception of the Fundy Shore Region and the County of Pictou in the Northumberland Shore region, this signage proposal was generally ranked in the lowest priority range.

Summary

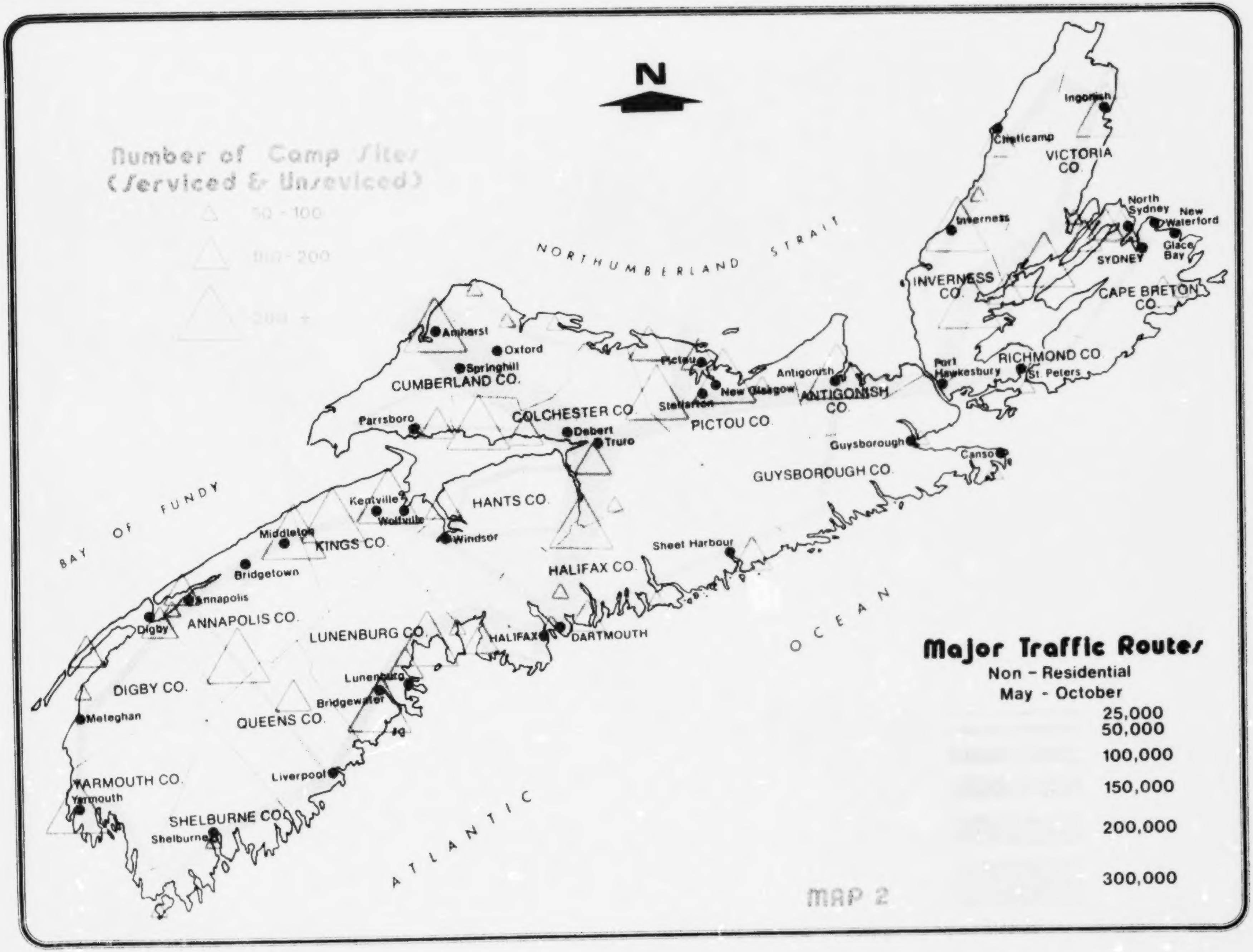
In future planning stages, all the destination attractions discussed above will have to be closely analyzed on the basis of their value in creating or servicing viable, multi-faceted destination complexes or clusters. These projects should aid in the adaption to growing trends within the tourism market by rounding out or better fulfilling the tourist's anticipation of a vacation experience.

The first step of analyzing Nova Scotia's plant in light of existing and potential vacation clusters will involve taking inventory of the Province's current situation. As a beginning, the maps on the following pages illustrate present traffic flows on the main routes throughout Nova Scotia. The maps also show the main groupings of accommodation and campground facilities in the Province. This step should be carried further to determine an inventory of areas which are also strong in restaurant, attraction, and entertainment, infrastructures throughout the Province.




Number of Accommodation
(Fixed Roof) Units
3000 +
1000 - 3000
400 - 1000
100 - 400
50 - 100
0 - 50
N
NORTHUMBERLAND STRAIT
BAY OF FUNDY
ATLANTIC OCEAN
Ingonish
Cheticamp
VICTORIA CO
North Sydney
New Waterford
Glace Bay
SYDNEY
Inverness
INVERNESS CO
CAPE BRETON CO
RICHMOND CO
Port Hawkesbury
St Peters
Amherst
Oxford
Springhill
CUMBERLAND CO.
Parrsboro
COLCHESTER CO
Debert
Truro
Pictou
New Glasgow
Stellarton
PICTOU CO
Antigonish
ANTIGONISH CO.
Guysborough
Canso
GUYSBOROUGH CO
Kentville
Wolfville
HANTS CO
Windsor
Middleton
KINGS CO.
Bridgetown
Annapolis
Digby
ANNAPOLIS CO
Sheet Harbour
HALIFAX CO
HALIFAX
DARTMOUTH
LUNENBURG CO
Lunenburg
Bridgewater
DIGBY CO
Meteghan
QUEENS CO.
Liverpool
YARMOUTH CO.
Yarmouth
SHELBURNE CO
Shelburne
Major Traffic Routes
Non - Residential
May - October
25,000
50,000
100,000
150,000
200,000
300,000

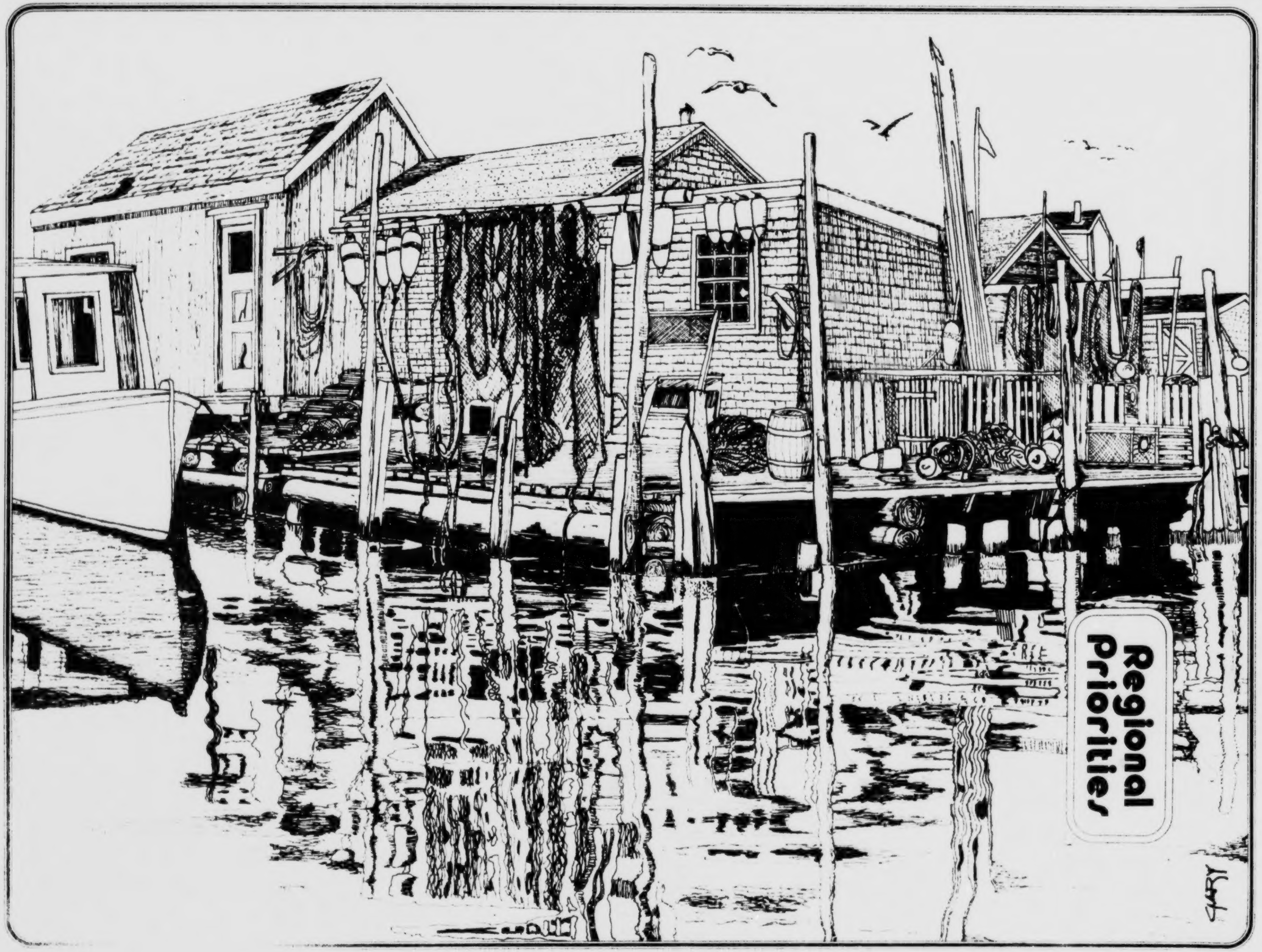
MAP I


N
Number of Camp Sites
(Serviced & Unseviced)
50 - 100
100 - 200
200 +
Major Traffic Routes
Non - Residential
May - October
25,000
50,000
100,000
150,000
200,000
300,000
NORTHUMBERLAND STRAIT
BAY OF FUNDY
ATLANTIC OCEAN
VICTORIA CO.
INVERNESS CO.
CAPE BRETON CO.
RICHMOND CO.
ANTIGONISH CO.
PICTOU CO.
GUYSBOROUGH CO.
CUMBERLAND CO.
COLCHESTER CO.
HANTS CO.
HALIFAX CO.
KINGS CO.
ANNAPOLIS CO.
LUNENBURG CO.
DIGBY CO.
QUEENS CO.
YARMOUTH CO.
SHELBURNE CO.
Ingonish
Cheticamp
Inverness
North Sydney
New Waterford
Glace Bay
SYDNEY
Port Hawkesbury
St. Peters
Antigonish
New Glasgow
Pictou
Stellarton
Guysborough
Canso
Amherst
Oxford
Springhill
Parrsboro
Debert
Truro
Kentville
Wolfville
Windsor
Middleton
Bridgetown
Annapolis
Digby
Sheet Harbour
HALIFAX
DARTMOUTH
Lunenburg
Bridgewater
Meteghan
Liverpool
Yarmouth
Shelburne

MAP 2

BOAT RENTAL
CHOWDER

Regional Priorities



Regional Priority-Setting Sessions*

This section will report the Consultant's results on a regional level as determined during the ranking processes. Since the priorities merely suggest a guide for the staging or timing of implementation, it is important to realize that a lower priority does not necessarily indicate that the proposal will never be implemented. Similarly, a high priority does not guarantee implementation if the proposal is found to be unfeasible after more detailed analysis.

The travel industry continually changes in response to economic and technological conditions. As new trends manifest themselves, tourism industry members must adjust their businesses and approaches to take full advantage of new opportunities. Regional Tourism Associations must regularly assess the direction of development in their areas. It is essential that the planning process continue, that opportunities are continually reassessed and priorities adjusted on both a regional and provincial basis to take maximum advantage of new potentials in the tourism sector.

Priority Ranking Process

To reiterate the process utilized in more detail, a ranking procedure was carefully constructed by the Consultants using planning criteria identified by those intimately familiar with

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*Material in this section is based on the Consultant's report on the regional meetings, Assessment of Development Priorities in the Tourism Sector, Nova Scotia, MRMS and Underwood McLellan Ltd., August 1982.

Nova Scotia's tourism industry. Following documentation and acceptance of this procedure by the Department of Tourism, the process was used in a series of nine identical sessions arranged with each Tourist Association. (The meeting held with the Eastern Shore Tourist Association also included proposals for Antigonish County in the Northumberland Shore region. In a recent resolution, the Association has officially changed its name to the Antigonish-Eastern Shore Tourist Association to better reflect its administrative jurisdiction.)

In order to keep the subject matter manageable and run the meetings efficiently, it was established that project lists would only include proposals contained in the regional studies. Ideas of province-wide application were included in every priority assessment. A summary list of all proposals, derived from the appropriate study, was distributed to participating regional representatives. All voting on proposals was done by secret ballot and tabulated by the Consultants.

In the first part of the process, participants were asked to evaluate each physical development proposal, on a 0-10 scale of priority, against each of eighteen planning criteria. This system of objectivity worked very efficiently as most participants agreed when their favourite project failed to achieve the highest ranking.

The criteria are repeated below under six main headings:

Fundamental Economic Criteria:

1. Increases number of visitors
2. Increases length of stay
3. Increases expenditures/visitors/days

Private Sector Benefits:

4. Generates additional private investment
5. Increases private sector incomes
6. Creates new private-sector employment

Product-Market Match:

7. Caters to projected visitors
8. Potential to increase visitor satisfaction
9. Entertainment value
10. Extends season

Location:

11. Supports regional development
12. Compatible with community development
13. Potential for inclusion in packages and group travel itineraries
14. Complements existing tourism development

Resident:

15. Community Support
16. Use by residents

Cultural Acceptance:

17. Relates to local culture, history and society
18. Enhances physical environment

These criteria were applied to physical development proposals which were organized into four categories as follows:

Large-Scale Projects
Small-Scale Projects & Events
Facilities (Accommodations and Restaurants)
Transportation

The priority ranking of service programs was based on the knowledge of industry participants concerning the conditions and needs of the tourism industry in their area. Marketing categories were generalized into three proposals: Marketing Outside The Region, Marketing Within Region and Local-level Marketing. During the session, these three identical categories were used in each region and illustrated where appropriate by examples.

Similarly, the Management and Training programs were generalized following the Tourism Development Strategy section on "Upgrading Human Resources." The four sub-categories of Manpower Development, Management Enhancement, Educational Support and Industry Advice were used in each regional session.

Combining the Categories

When the scores from the criteria voting phase were tallied and recorded, ranked lists from the six main categories mentioned above were posted while participants observed whether or not they were a true reflection of their collective consensus. Following the posting of these lists, participants were asked to score individual proposals from all categories on a 0-6 scale; (where 0 indicated lowest priority and 6 indicated highest priority), on the basis of their perception of the proposal's importance to the development of the tourism industry in their region. In order to reflect the previously agreed collective consensus, the participants could not reorder the ranking of proposals within each individual category. As a result, this process not only ranked projects from the six categories together in one list, it also produced a further refinement of the already established lists. At the close of almost all the sessions, the participants expressed themselves well satisfied with both the results and the process through which they were obtained.

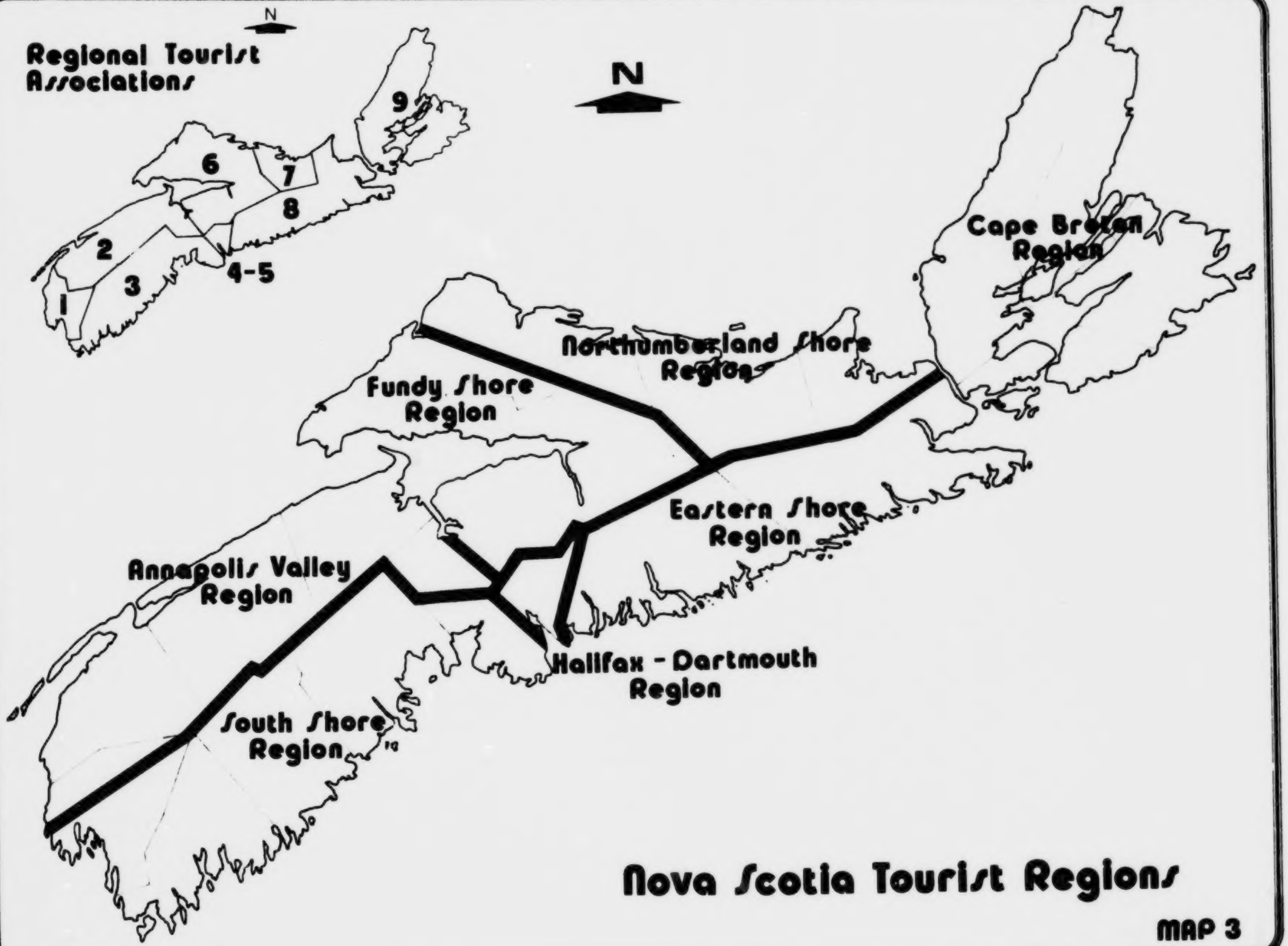
The results of these regional sessions were then analyzed by the Consultants to determine the provincial priorities discussed in the previous sections of this report. Each regional list was divided into three, approximately equal sections by the Consultants. These three sections are referred to as the high priority, mid-range and low-level priority groupings. Natural break points between the ranges were derived from both the overall priority list and the initial ranking by categories from each regional session.

The specific results of each regional meeting are reported in the proceeding pages in the following order:

Annapolis Valley Region
Yarmouth/Argyle Region
South Shore Region
Halifax/Dartmouth Region
Eastern Shore Region
Cape Breton Region
Northumberland Shore Region
Fundy Shore Region

The three meetings held in the Northumberland Shore are combined, as far as possible, to produce a single regional analysis. The Yarmouth/Argyle region is reported separately rather than being combined with the Annapolis Valley or South Shore regions.

For those unfamiliar with the Tourist Regions of Nova Scotia, the map on the following page illustrates the seven regions and the nine corresponding Tourist Associations.


Regional Tourist Associations
N
1
2
3
4-5
6
7
8
9
N
Cape Breton Region
Northumberland Shore Region
Fundy Shore Region
Eastern Shore Region
Annapolis Valley Region
Halifax - Dartmouth Region
South Shore Region

Nova Scotia Tourist Regions

MAP 3

ANNAPOLIS VALLEY REGION

Incentives proposals related to facilities development were voted in the highest priority range in the Annapolis Valley Region. Three of the first five proposals are of this type with accommodation and campground incentives being given equal weight as the number one priority. Heavy support was also expressed for the development of a bed and breakfast program. These priorities strongly indicate a need to upgrade and expand the existing plant within the Valley. Both the private sector and government have a role to play in providing investment and assistance programs to assist operators wishing to enhance their facilities.

The tourism development strategy for the Annapolis Valley that was expressed during the session was that the "Valley" is an attraction in itself and should be marketed as such. As well, expanded marketing of regional festivals such as the Apple Blossom celebration, promotion of get-away weekends in the Valley to the Metro region and heavier coverage at gateway points to the region were all discussed relative to the Marketing category. The need to better inform tourists about the vacation opportunities in the Valley once they enter the region was also expressed. In addition to this strong support for Marketing, Management and Training proposals were viewed as extremely important by the Valley participants.

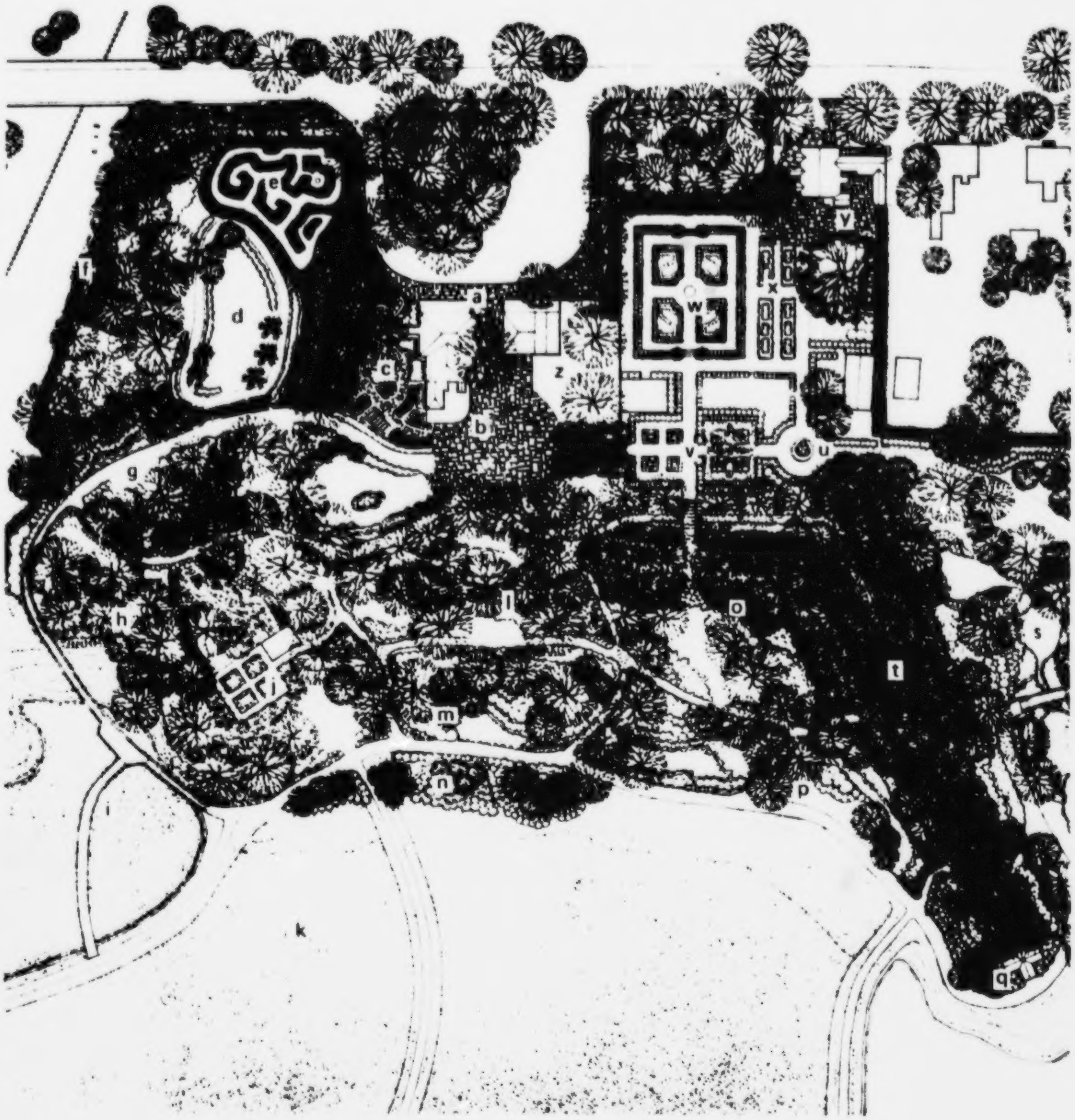
The part of the Annapolis Valley region which is least developed is the District of Clare as visitors using the Yarmouth ferries travel through the South Shore or pass through the District of Clare en route to the Valley proper. Interpretation of the interesting historical development of forestry in western Nova

Scotia could be provided through a reconstruction of New France as a year-round theme park. This or a similar major attraction is necessary if the area is to hold visitors. Such an attraction would also be complementary to the Yarmouth area and was given top priority among attractions in that region as well.

The Annapolis Basin and the Kentville-Wolfville areas are the major tourist centres in the Valley. Improvements were suggested for each location, with theatres given prominence. Between the two theatre-type proposals ranked, greater support was expressed for Kings Theatre in Annapolis Royal. The proposal to convert the restored Kipawo Ferry into a theatre/cabaret received a much lower rank, appearing in the mid-range priority.

Table 2 on the following page illustrates the priority ranking of development proposals for the Annapolis Valley Region. The base map which appears following this list illustrates a cross section of attractions on a locational basis.

Town of Annapolis Royal
Historic Garden


e
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q

TABLE 2

ANNAPOLIS VALLEY REGION

Assessment of Development Priorities in the Tourism Sector:

PRIORITY LIST OF HARDWARE PROJECTS

1. Accommodation and Restaurant Incentives
Campground Incentives
3. Bed and Breakfast Program
4. New France
Farm Vacations
6. King's Theatre
Historic Gardens Funding
8. Boating

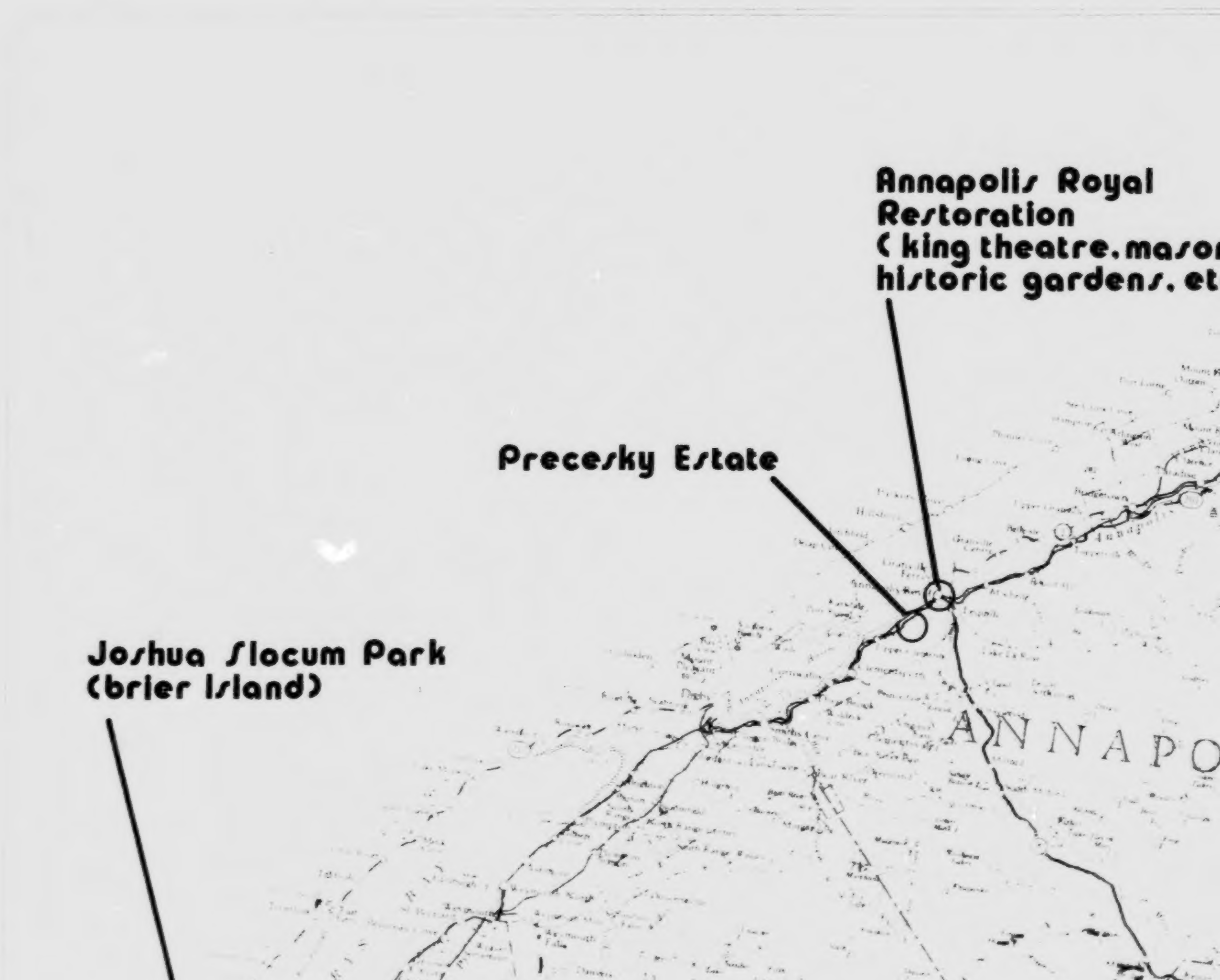
Mini-Van System
Rest Stations
11. Kipawo Theatre
12. Signage
Tourism Mapping
14. Micmac Day Trips
Joshua Slocum Park
Prescesky Seminar Centre
17. Tidal Power Centre
Local Cuisine
19. Dyke Trail
Annapolis Wharf

21. Horseback Riding
22. Reservation Campground
23. Mini Trails
St. Anne Accommodation
25. Cape Split Trail
26. Masonic Home
27. Railway Stations
28. Cruise Ship Facilities
29. Excursion Train

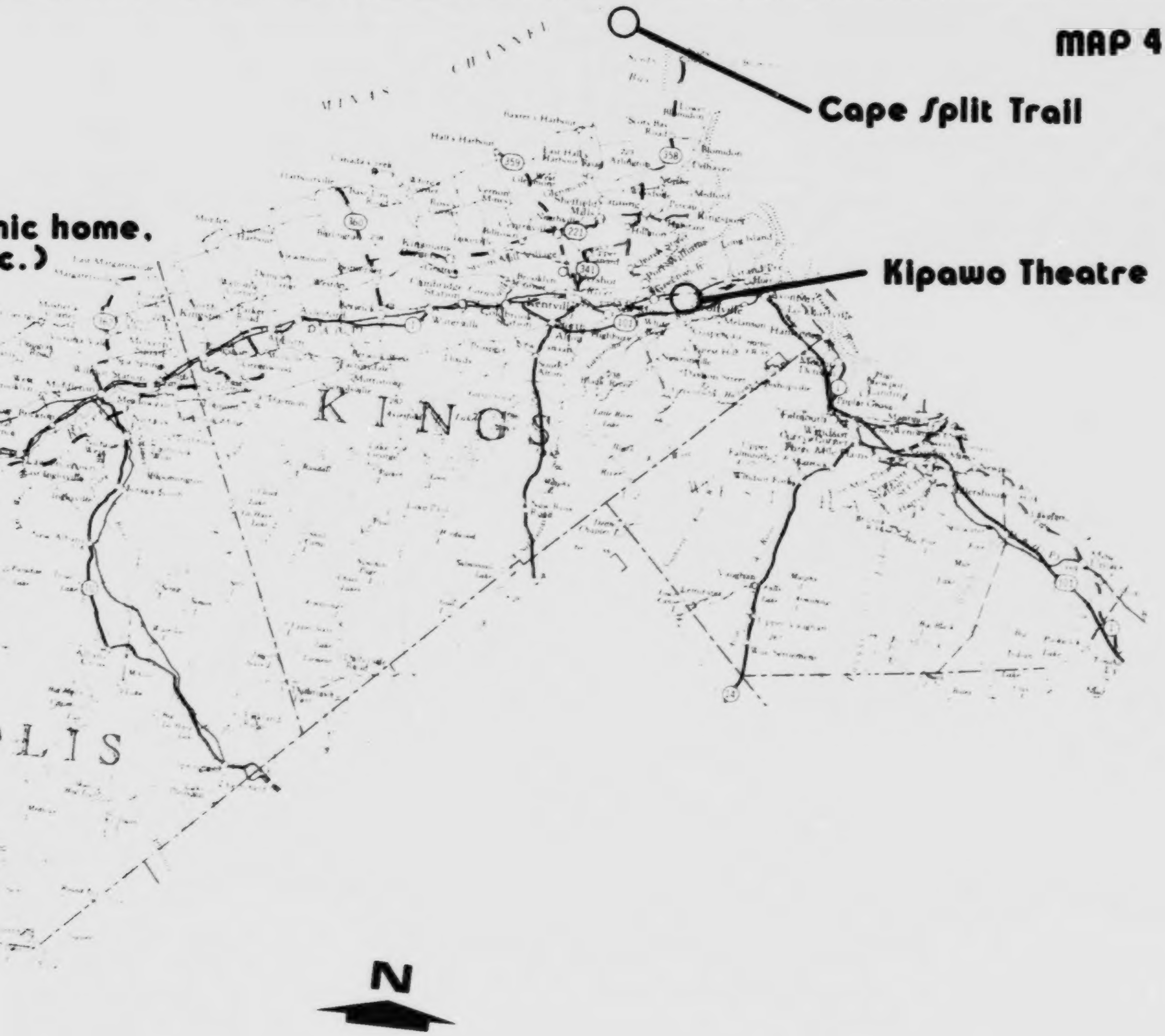
SOFTWARE PROJECTS

MANAGEMENT AND TRAINING
MARKETING

Rating System


Annapolis Royal
Restoration
(king theatre, maso
historic gardens, et
Precesky Estate
Joshua Slocum Park
(brier Island)
ANNAPO
DIGBY
New France
YARMOUTH

MAP 4


Cape Split Trail
nic home,
c.)
Kipawo Theatre
MINAS CHANNEL
KINGS
LIS
N

Annapolis Valley Region

YARMOUTH/ARGYLE AREA

The Yarmouth Tourist Association covers the area including the Town of Yarmouth and the Municipalities of Yarmouth and Argyle. The area is relatively strong in accommodations but tends to lack a varied attraction base; acting more as a pass-through area for tourists heading to and from Yarmouth and ship connections to the New England States. In these latter respects, the area is similar to the adjacent Municipality of Clare and this fact was expressed by industry representatives in considering a proposal to establish a new Tourism Region and Association which would also include the District of Clare.

Clare
Yarmouth
Argyle

Absolute priority was given to the establishment of this new region, which would include the Town of Yarmouth and the Municipalities of Clare, Yarmouth and Argyle. The representatives unanimously insisted that this proposal for a new region be placed at the top of the list and that all other proposals be ranked beneath it. It should be noted however that at the priority ranking session in the Annapolis Valley, representatives from Clare expressed opposition to being included in the proposed new region.

Having established the need for a new organization, the next priority was to establish a major attraction in the area. This attraction was identified as the rebuilding of the lumbering community of New France as a theme park with year-round recreational activities. Significantly, this project is located in the District of Clare area but was given top priority by the representatives from the Yarmouth area which indicates their perception of its importance to the proposed region.

Facility incentives were also judged as essential for accommodations and restaurants, and for campgrounds in the region. Following these two incentives proposals, the region voted a series of attractions into the top priority range designed to help round out the vacation experience in the Yarmouth/Argyle area. The development of a lighthouse museum at Cape Forchu, a natural environment park on Tusket Island and improved boating opportunities for the area were among the projects recommended.

Given the present situation, the priorities would appear to address the region's needs; emphasizing organizational changes, attractions to stop and entertain the tourists, increased marketing, and improvements to the physical plant and manpower serving the industry.

The table on the following page illustrates the priority ranking of development proposals for the Yarmouth/Argyle region.

TABLE 3

YARMOUTH/ARGYLE AREA

Assessment of Development Priorities in the Tourism Sector:

PRIORITY LIST OF HARDWARE PROJECTS

1. Gateway Region
2. New France
3. Accommodation and Restaurant Incentives
Campground Incentives
5. Tusket Island Park
Boating Opportunities
7. Cape Forchu Museum

8. Mini Trails
Mini-Van System
10. Yarmouth Convention Facilities
11. Tobeatic Resource Management Area
Cruise Ship Facilities
13. Entry Point Improvements
14. Local Cuisine

15. Yarmouth Craft Outlet
16. Seafood Delivery System
17. Excursion Train
Bed and Breakfast Program
Signage
20. Horseback Riding
Farm Vacations
22. Acadian Museum Expansion
23. Rest Stations

SOFTWARE PROJECTS

MANAGEMENT AND TRAINING
MARKETING

Rating System

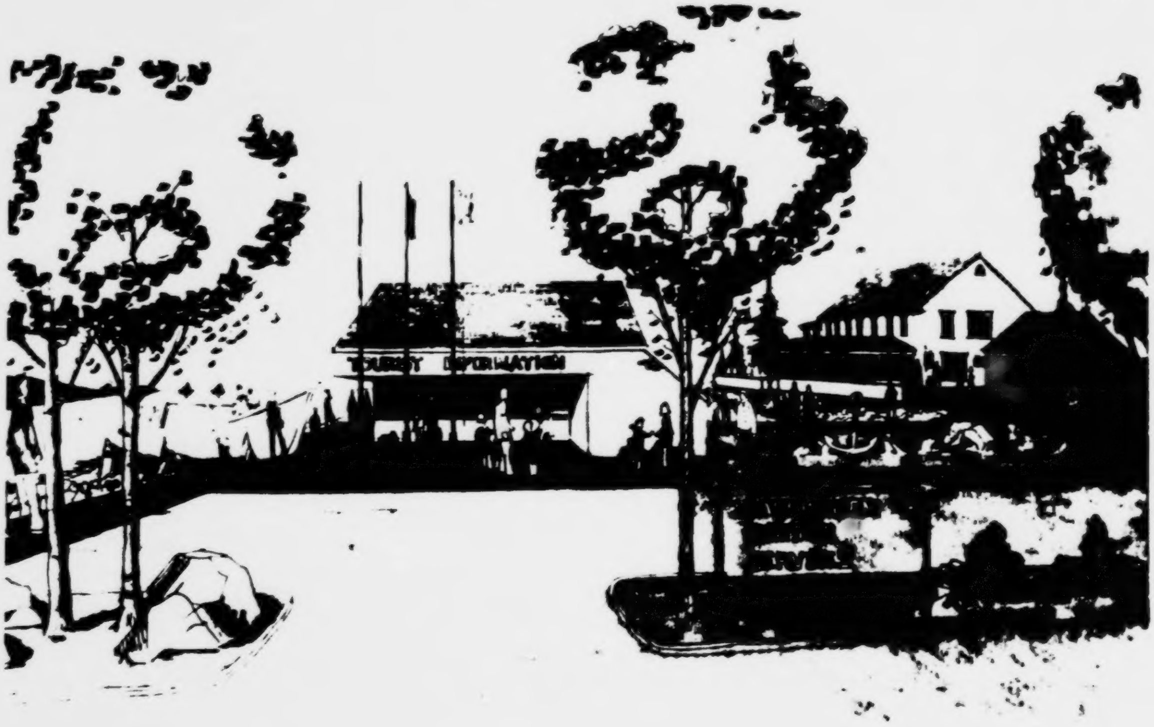
SOUTH SHORE REGION

Accommodations and campground facilities were ranked in the lower ranges by South Shore participants. Instead, heavy emphasis was put on the enhancement of the more unique types of fixed-roof accommodation such as Bed and Breakfast, Country Inns and Farm Vacations. Though the hotel/motel and restaurant incentive program was not viewed as crucial, the idea was expressed that more efficient use of the existing facilities base might be obtained through the proposed rating system which will enable travellers to better select accommodations suited to their needs.

The series of attractions proposed are designed to improve the economic viability of existing facilities. Apart from major urban development proposals in Shelburne and Barrington Core which ranked high, a series of attractions including beaches, trails and coastal parks are of a high priority in various locations. These attractions are needed to hold visitors longer and increase the use of existing facilities. Upon review, the South Shore Tourist Association requested that the campground proposal for the Carter's Beach area be placed among the top priority projects as it is of significance to Southern Queens County.

Development of the tourism industry in the South Shore region depends on a series of improvements and additions to accommodation facilities and increasing their economic viability through a series of expanded attractions, many of a small scale nature. This strategy should enable the region to hold more "pass through" travellers longer. To this end, the important role of rest stations in providing local information is given high priority. Relocation of the Lunenburg tourist bureau would also contribute to providing more regional information to a greater number of visitors.

It is worth noting that some participants feared that development of the Tobeatic Resource Management Area would result in a loss of conservation objectives, otherwise this proposal may have achieved a higher ranking.



The table on the following page illustrates the priority ranking of development proposals for the South Shore Region. Following Table 4, a cross section of proposals is locationally illustrated on a map of the region.

Table 4

SOUTH SHORE REGION

Assessment of Development Priorities in the Tourism Sector:

PRIORITY LIST OF PROJECTS

1. Shelburne Cox Warehouse
2. Rest Stations
Beach Parks
Haulover
5. Bed and Breakfast Program
6. Mini Trails
Tourist Info., Lunen./Chester
Barrington Core
9. Country Inns
10. Farm Vacations
11. Coastal Parks

*12. Seaside Campground
Peggy's Cove
Accommodations and Restaurant Incentives
15. Fort Point Museum
Tobeatic Resource Management Area
17. Local Cuisine
18. Shelburne Dock Street
19. Hiking Trails
20. Horseback Riding
Bridgewater Visitation Centre
22. Urban Parks
Excursion Train
24. Bridgewater King Street
Mini-Van System

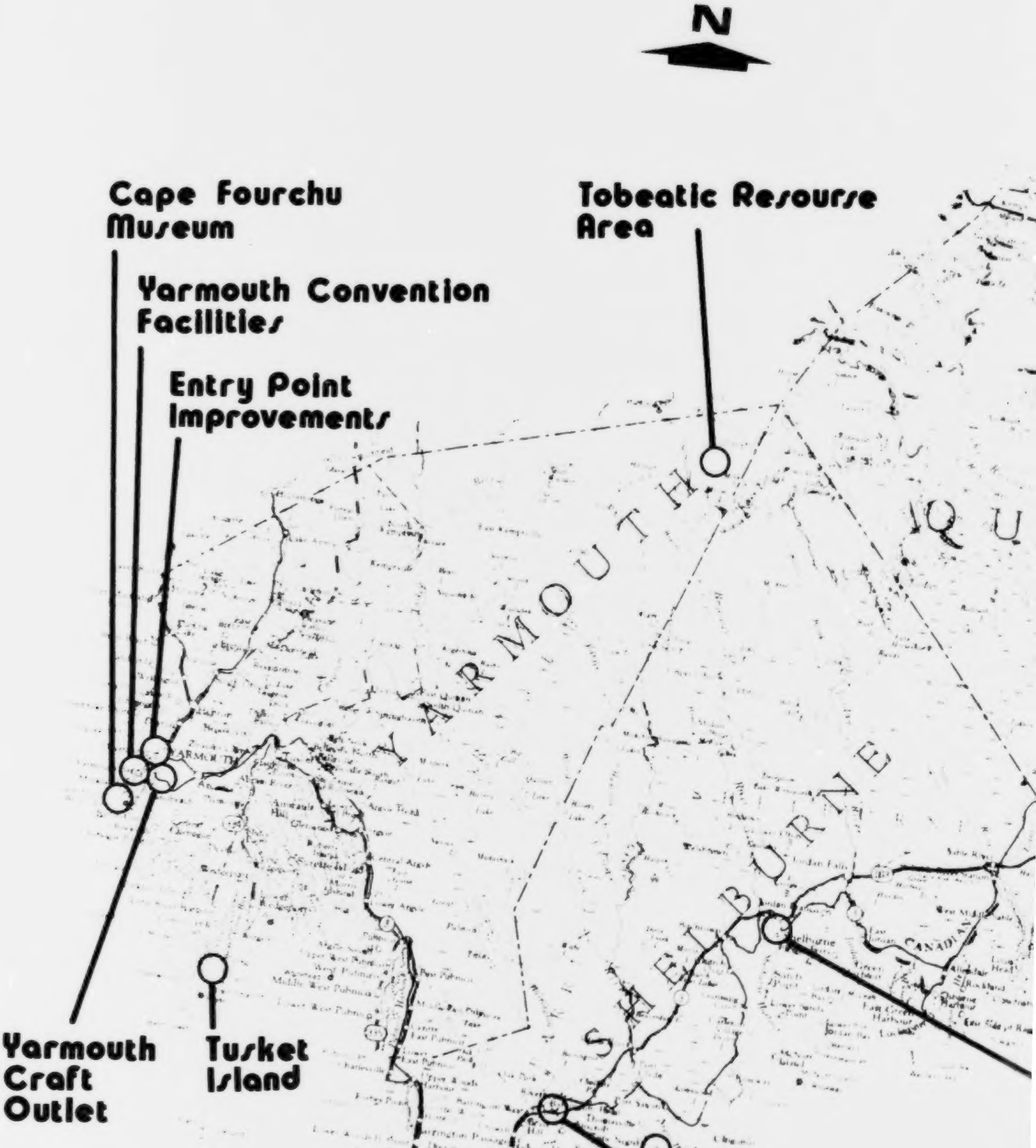
26. Seafood Delivery System
27. Campground Incentives
Bicycle Tours
29. Tuna Ranch Tours
30. Liverpool South Side Preparation
31. Shelburne Marina
32. Mahone Bay
33. Signage
Seashore Interpretation
35. Liverpool South Side Development
36. Town Entrances
37. Lunenburg CN Right-of-Way

SOFTWARE PROJECTS

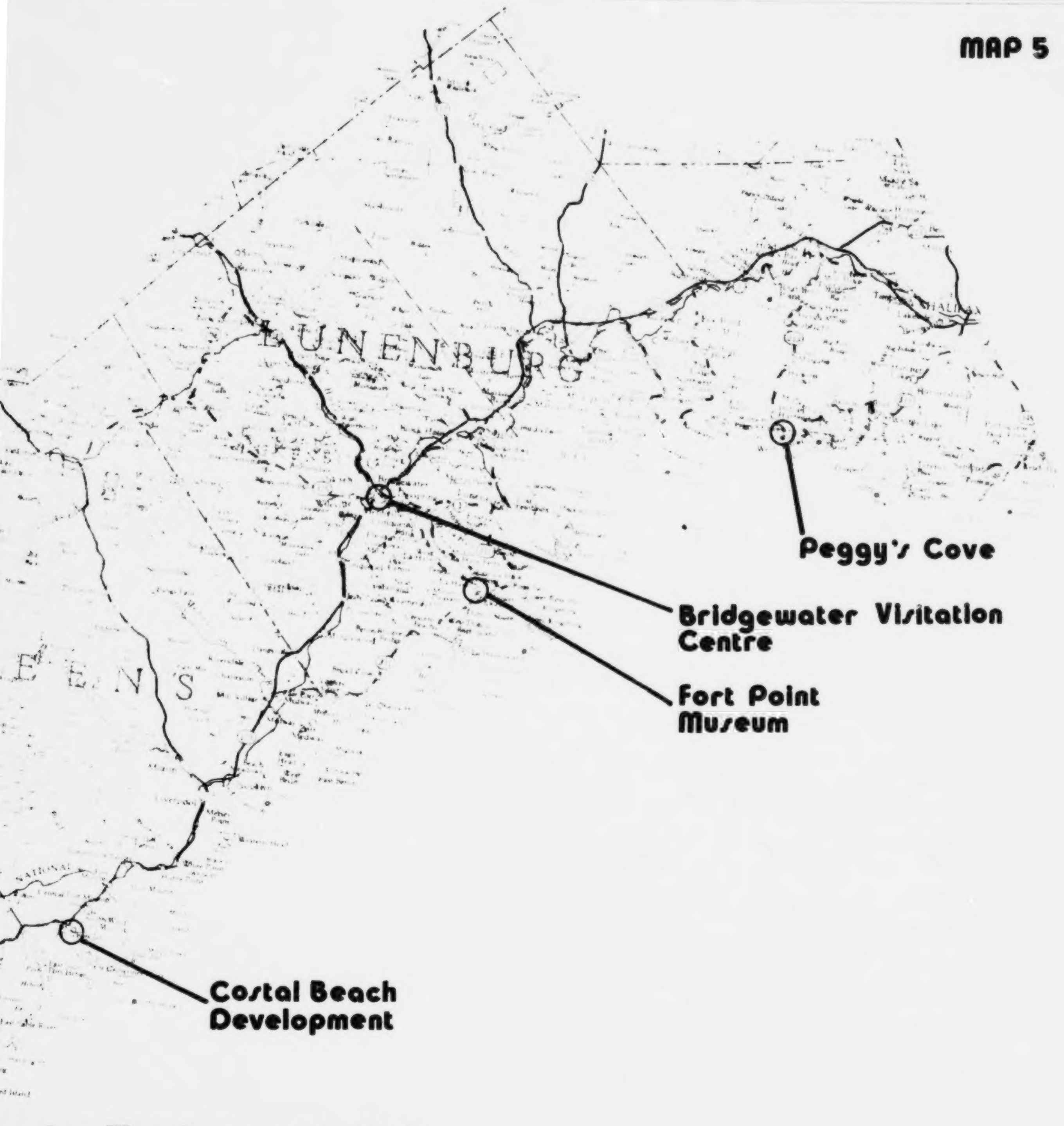
MANAGEMENT AND TRAINING
MARKETING

Rating System

*Upon review, the South Shore Tourism Association requested that the Seaside Campground proposal be considered among the top priority proposals.


N
Cape Fourchu Museum
Tobeatic Resourse Area
Yarmouth Convention Facilities
Entry Point Improvements
YARMOUTH
QU
SHELBURNE
Yarmouth Craft Outlet
Tusket Island
Haulover
Barrington Core

MAP 5



Peggy's Cove

Bridgewater Visitation Centre

Fort Point Museum

Costal Beach Development

Cox Warehouse and Dock Street Improvements

South Shore Region

HALIFAX-DARTMOUTH REGION

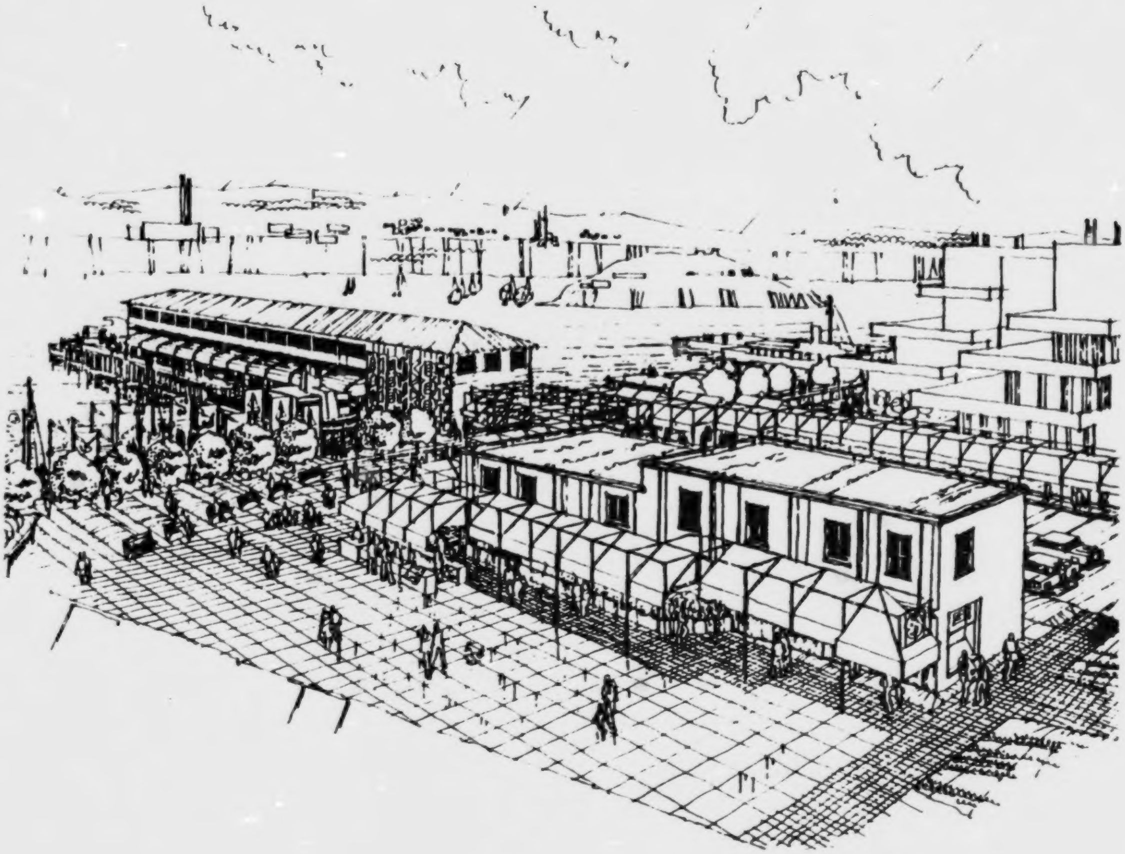
The Halifax-Dartmouth region is steadily expanding its role both nationally and internationally as the major centre for attracting tourists to Nova Scotia. Generally, priorities include developing facilities and events, improving manpower and management skills, and continuing the planning process so as to enhance the Region's appeal to a broader world market, including large national and international conventions. This would appear to be in accord with the continuing positive development of the region which will bring benefits to all areas of Nova Scotia.

Endorsement of the importance of completing the World Trade Centre was given top priority. Second priority is to establish a major, late-season regional festival which could become nationally and perhaps internationally known as a means of drawing more tourists into the area. The participants also identified a series of high priority needs designed to improve accommodations and restaurants. These include incentives, a rating system for accommodation, management enhancement and staff training. Reflecting the importance of conventions, the group strongly supported the proposal calling for a study of convention delegates' profiles, needs and preferences. Also in the highest priority group is a proposed marina in Dartmouth and the encouragement of an additional hotel facility in Downtown Dartmouth. In addition, it was felt that there is a need to rationalize parking in Downtown Halifax in the light of a number of proposed construction projects.

Marketing was also considered to have a very high priority. Of any region in the Province the Halifax/Dartmouth region perhaps has the greatest potential for marketing outside the Province in other areas of Canada, the United States and Overseas.

In the mid-range, priority was placed on the development of parts of the Regional Park System (Watershed Lands, Hemlock Ravine), on establishing a Regional Tourism Association, on a restaurant rating system, and improving the public's knowledge of the importance of tourism to the Region.

The table on the following page illustrates the priority ranking of development proposals for the Halifax-Dartmouth region. The map following the table provides a cross section of proposals.



Public Marina
Dartmouth

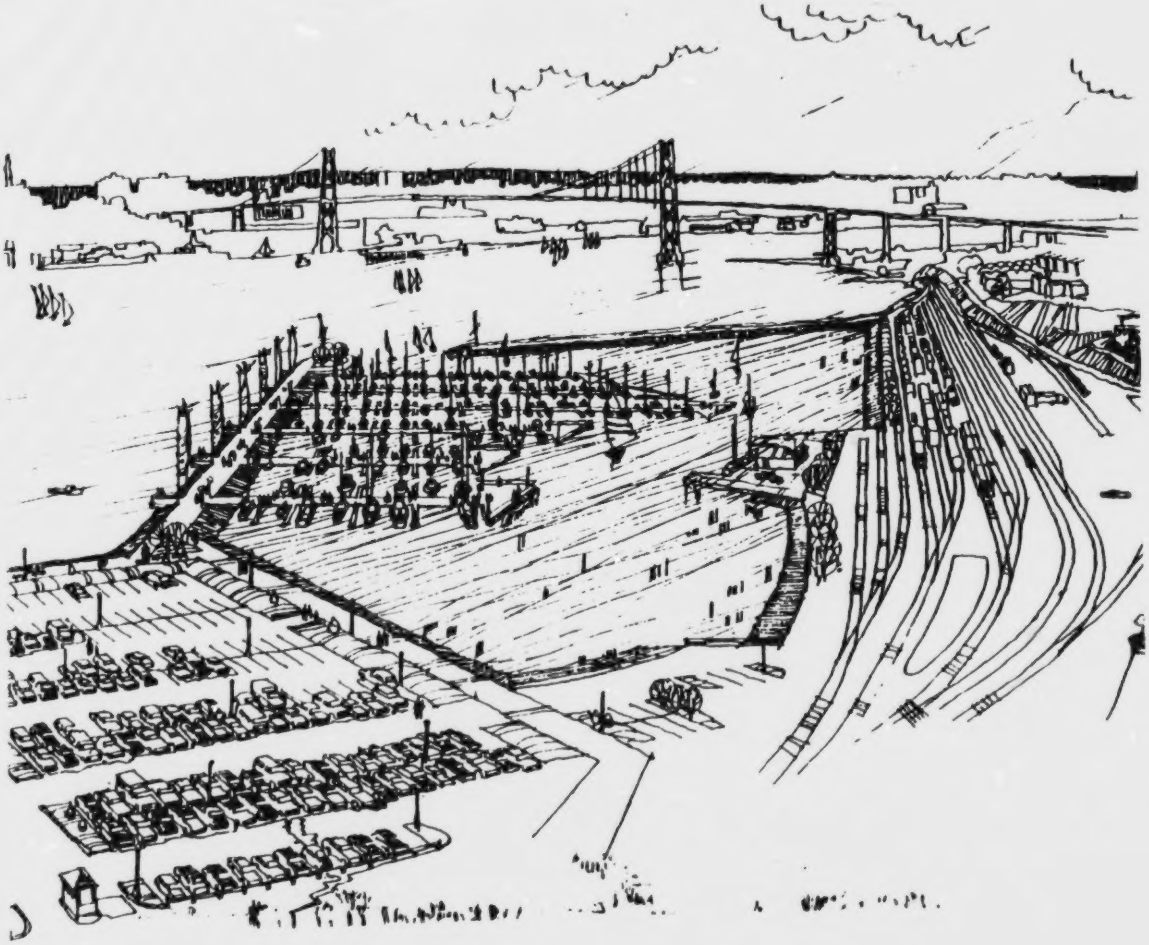


TABLE 5

HALIFAX-DARTMOUTH REGION

Assessment of Development Priorities in the Tourism Sector:

PRIORITY LIST OF HARDWARE PROJECTS

1. World Trade Centre
2. Halifax/Dartmouth Regional Festival
Accommodation and Restaurant Incentives
4. Convention Delegate Study
5. Dartmouth Marina
6. Parking & Transportation Study
Dartmouth Hotel Facility

8. Watershed Lands Park
Hemlock Ravine
10. Regional Tourism Association
11. Mini-Van System
12. Public Market
Campground Incentives
14. McNab's Island
Cruise Ship Facilities
16. Rest Stations
17. Marketing and Economic Impact Study

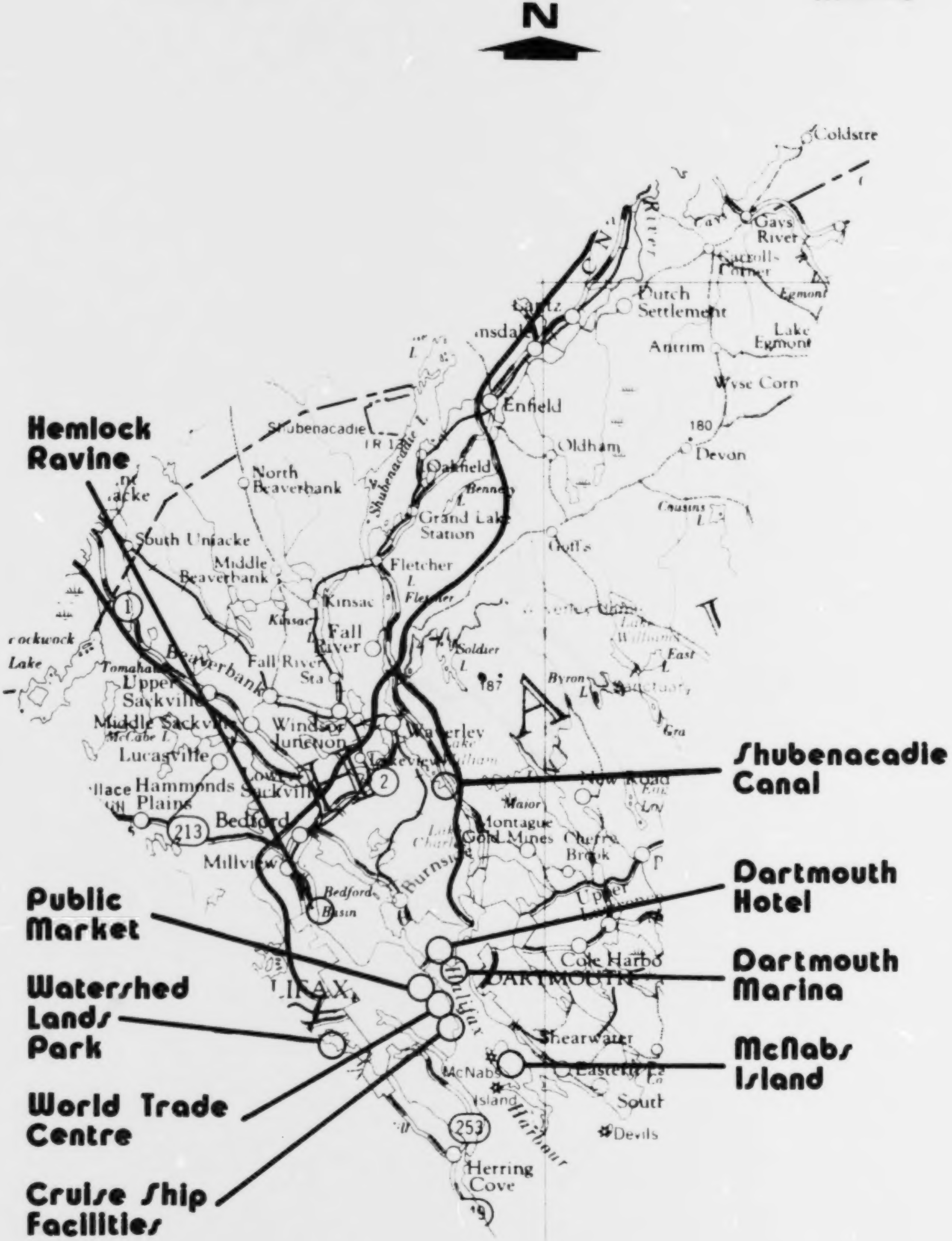
18. Local Cuisine
Seafood Delivery System
Mini-Discovery Trails
21. Shubenacadie Canal System
22. Bed and Breakfast Program
23. Signage
24. Farm Vacations
25. Music Capital Theme
26. University Accommodation
27. Excursion Train
Horseback Riding

SOFTWARE PROJECTS

MANAGEMENT AND TRAINING
MARKETING

Rating System

MAP 6


N
Hemlock Ravine
Shubenacadie Canal
Dartmouth Hotel
Public Market
Dartmouth Marina
Watershed Lands Park
McNabs Island
World Trade Centre
Cruise Ship Facilities
Coldstre
Gays River
Carrolls Corner
Dutch Settlement
Antrim
Lake Egmont
Wyse Corn
Enfield
Oldham
Devon
Shubenacadie
North Beaverbank
Oakfield
Grand Lake Station
South Uniacke
Middle Beaverbank
Fletcher L.
Kinsac
Fall River
Fall River Sta
Upper Sackville
Middle Sackville
Windsor Junction
Waverley
Lucasville
Hammonds Plains
Lower Sackville
Bedford
Millview
Bedford Basin
Montague Gold Mines
Cherry Brook
Cole Harbo
DARTMOUTH
Halifax
Shearwater
McNabs Island
Eastern
South
Devils
Herring Cove
1
2
213
253
187
180

Halifax/Dartmouth Region

EASTERN SHORE REGION

The Eastern Shore Region includes the eastern part of Halifax County and all of Guysborough County (the Municipalities of St. Mary's and Guysborough, the Towns of Canso and Mulgrave). With the exception of Sherbrooke Village and the rugged coastal scenery, the area's attractions are limited and underdeveloped. The industry representatives from the Eastern Shore were the only participants to exercise their right not to rank some programs from their proposal list, nevertheless, some general conclusions can be drawn from the results of this session.

Sherbrooke Village is recognized as a significant attraction, since priority was given to the continuing development of that project. Emphasis is also placed on the Grassy Island Park development and providing increased access to the region's beaches for day-use purposes. At the next priority level are a series of major projects including the St. Mary's Salmon Centre, Sheet Harbour Visitor Centre, the continuing development of the Seaside Park System, and a centre depicting the history of gold mining in the region.

Further priorities included a Visitor Centre at Sheet Harbour, incentives to accommodations and restaurants, and the provision of marketing information to visitors attracted to the region. At a lower level in priority are further projects including the Liscomb Fish Ladder, a rest stop, campground incentives and providing information on local communities and events.

Table 6 on the following page illustrates the priority ranking of development proposals for the Eastern Shore region. The map provides locational information on a cross section of proposals.

SALMON CENTRE

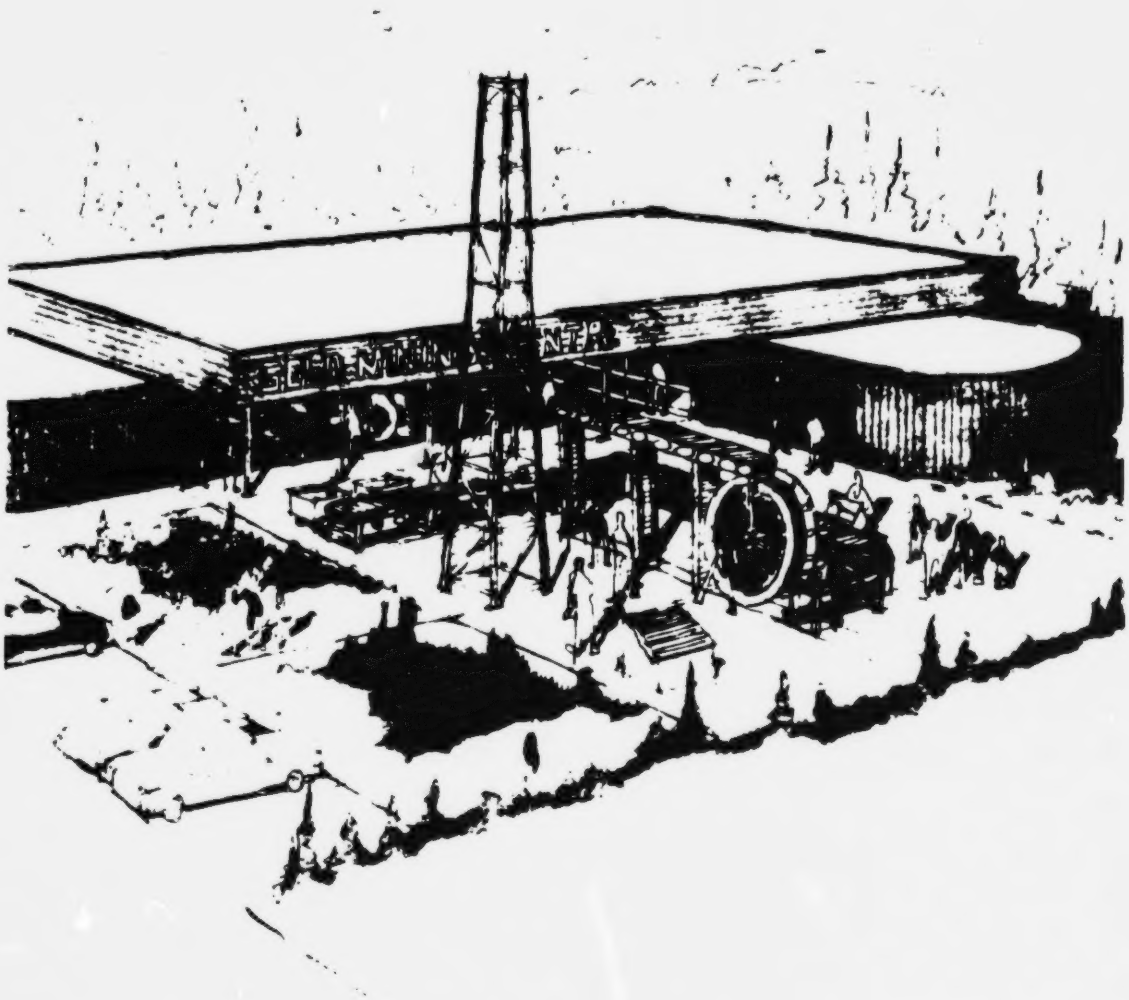


TABLE 6

EASTERN SHORE REGION

Assessment of Development Priorities in the Tourism Sector:

PRIORITY LIST OF HARDWARE PROJECTS

1. Sherbrooke Village
Day Use Beaches
Grassy Island Park
4. St. Mary's Salmon Centre
Gold Mining Centre
Seaside Parks System
7. Sheet Harbour Visitor Centre
8. Accommodation & Restaurant
Incentives

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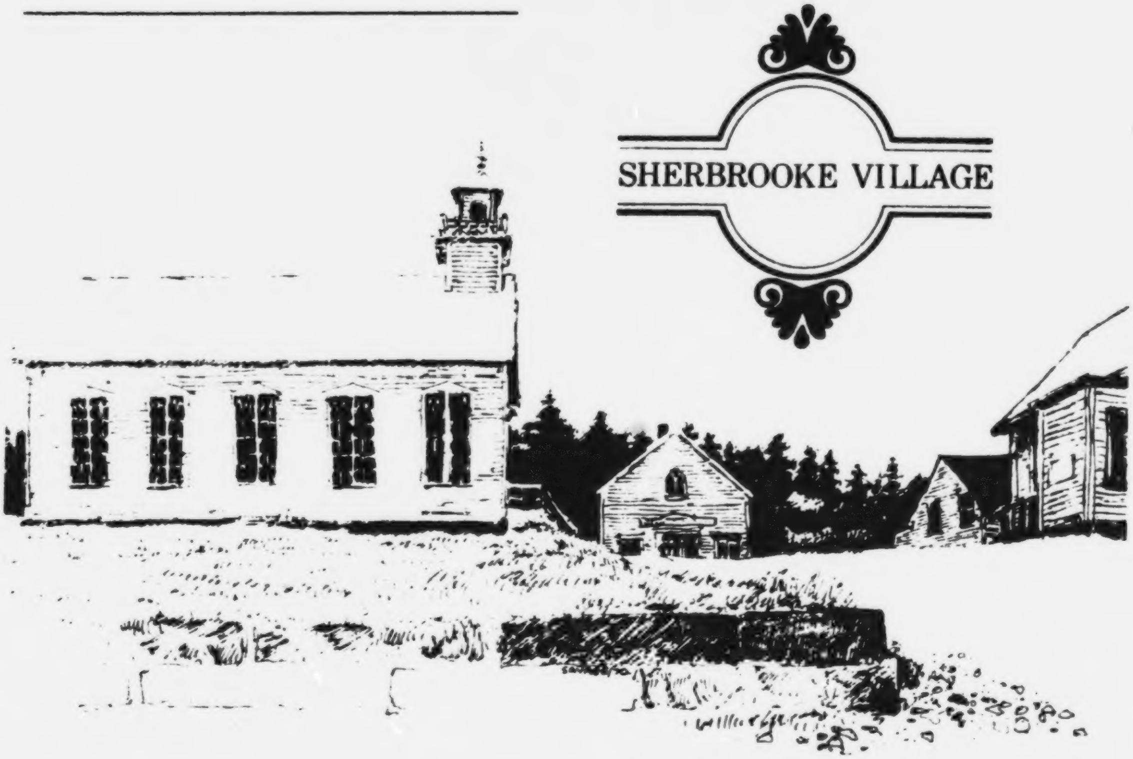
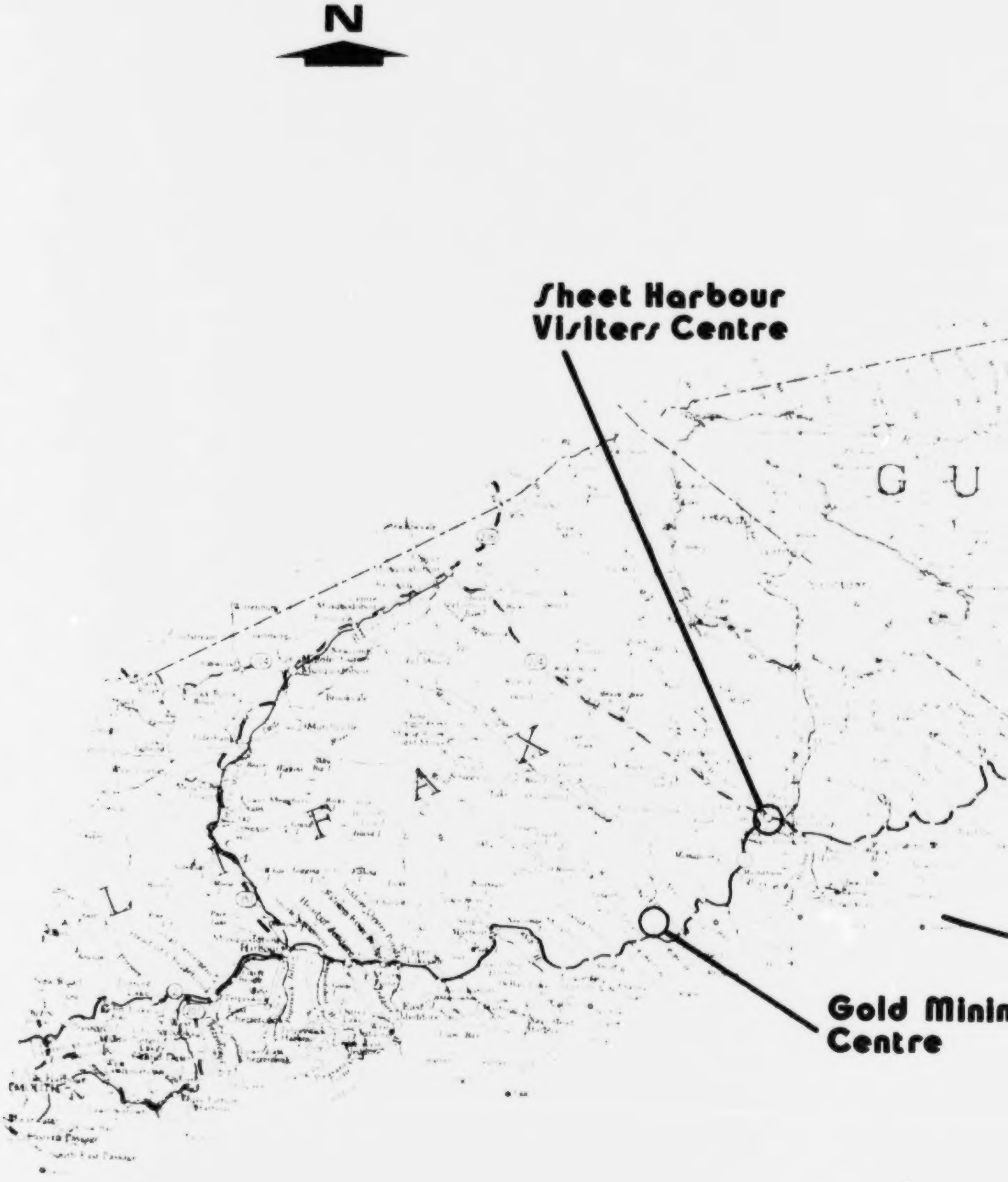
9. Liscomb Fish Ladder
Pirate's Harbour Rest Stop
Campground Incentives

SOFTWARE PROJECTS

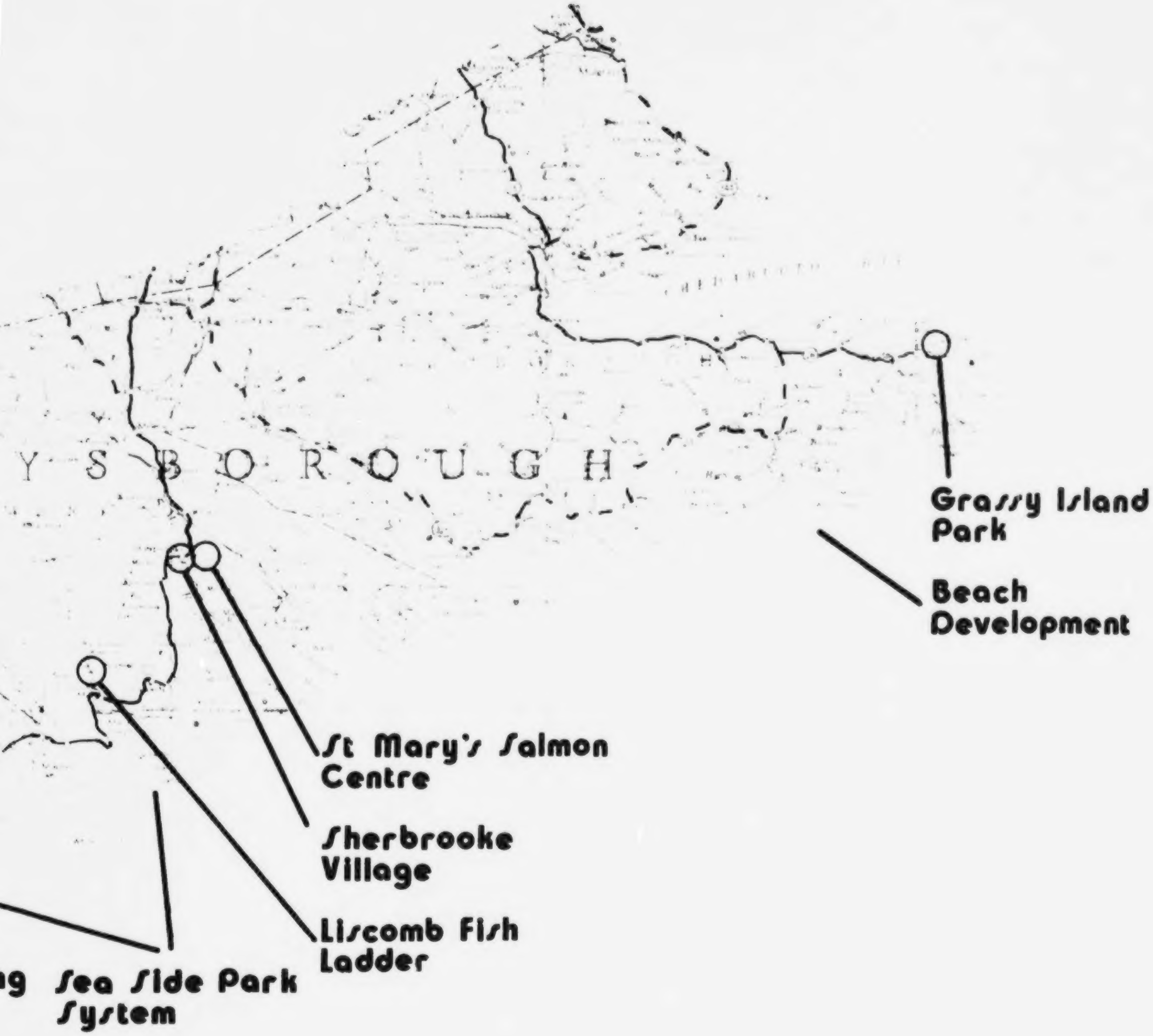
MANAGEMENT AND TRAINING
MARKETING

Rating System




N
Sheet Harbour
Visiters Centre
G U
L
F A X
Gold Minin
Centre

MAP 7


YSBOROUGH
Grassy Island Park
Beach Development
St Mary's Salmon Centre
Sherbrooke Village
Liscomb Fish Ladder
ng
Sea Side Park System

Eastern Shore Region

CAPE BRETON REGION

In the Cape Breton region, it was viewed that the accommodations sector could be strengthened through two measures; continued incentives for additions and improvements to fixed-roof accommodations and restaurants, and the initiation of a rating system to better guide visitors to the accommodations most suited to their needs.

Additional high-priority attractions will aim at developing areas in the tourism sector including Isle Madame, the lower Margaree Valley and boating on the Bras d'Or Lakes. The well developed tourist centres of Baddeck, Louisbourg and the Cape Breton Highlands National Park were considered to be among the main assets of the region along with the Cabot Trail.

Cape Breton has one of the most developed and economically stable tourist sectors of all regions in Nova Scotia. The emphasis on training programs and a "rounding out" of the facilities and attractions is probably indicative of the direction which other regions will take as the industry becomes more fully developed. In addition, as with the Halifax/Dartmouth region, Cape Breton has the potential to be marketed on an international level.

The table on the following page illustrates the priority ranking of developmental proposals for the Cape Breton region. The map following this table provides a cross section of development proposals.

TABLE 7

CAPE BRETON REGION

Assessment of Development Priorities in the Tourism Sector:

PRIORITY LIST OF HARDWARE PROJECTS

1. Accommodation and Restaurant Incentives
2. Isle Madame Acadian Fishing Village
Margaree Wildfowl Preserve
4. Boating - Bras d'Or Lake

---

5. Horseback Riding
6. Baddeck Multi-cultural Centre
Campground Incentives
Port Hood - P.E.I. Ferry
Fleur-de-lis Highway
10. Bell Cup
Bed and Breakfast Program
Farm Vacations
13. Mabou Highlands Park and Trail System
Mini-Van System

---

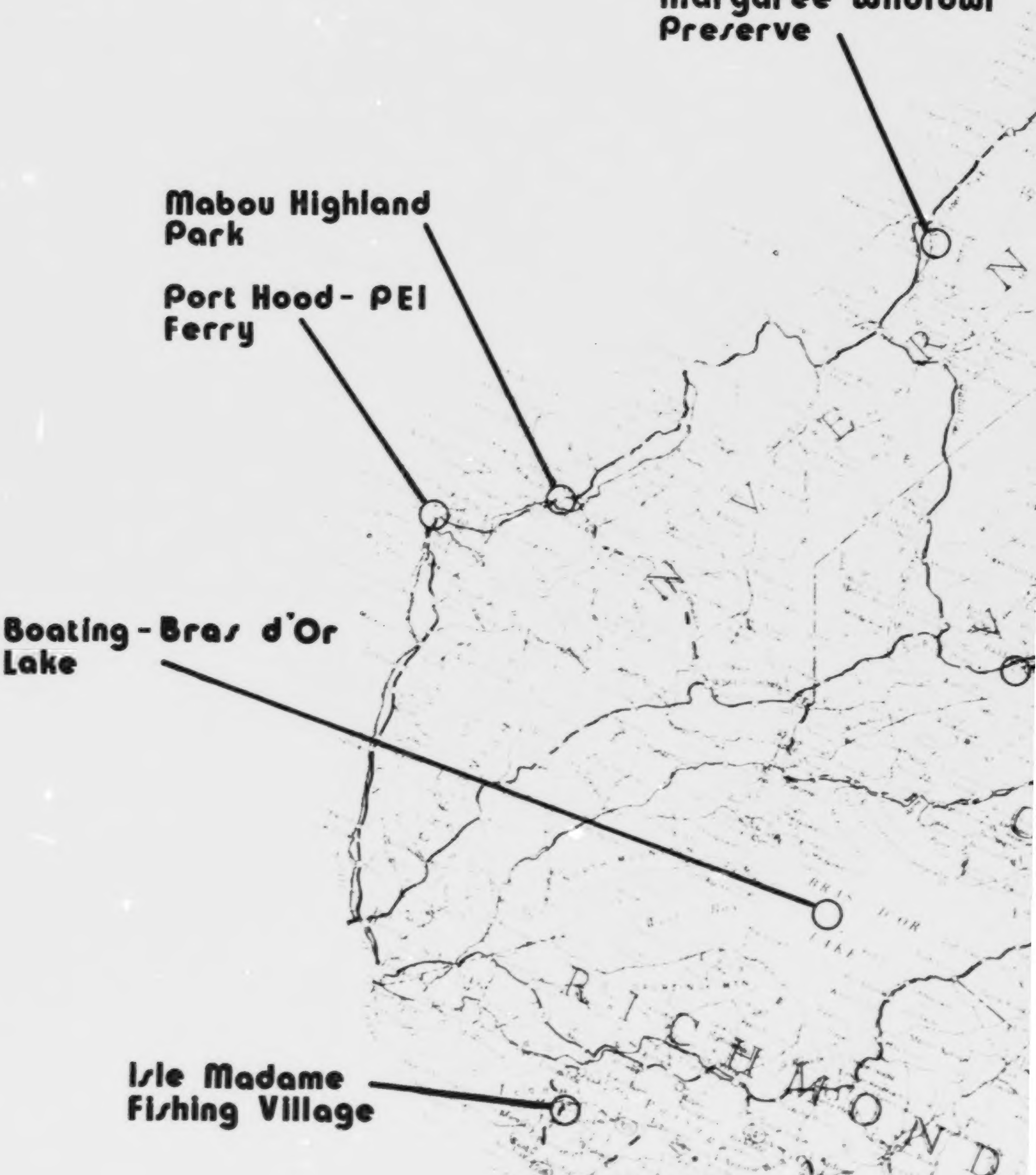
15. Cruise Ship Facilities
16. Inventors' Conference
17. Local Cuisine
Signage
19. Seafood Delivery System
* Aulds Cove
Rest Stations
22. Excursion Train
Mini Trails
24. Trail System
25. Louisbourg Campground
26. Royal Battery

*Upon review, the Cape Breton Tourism Association requested that the Auld's Cove proposal be considered within the top ten priority ranking.

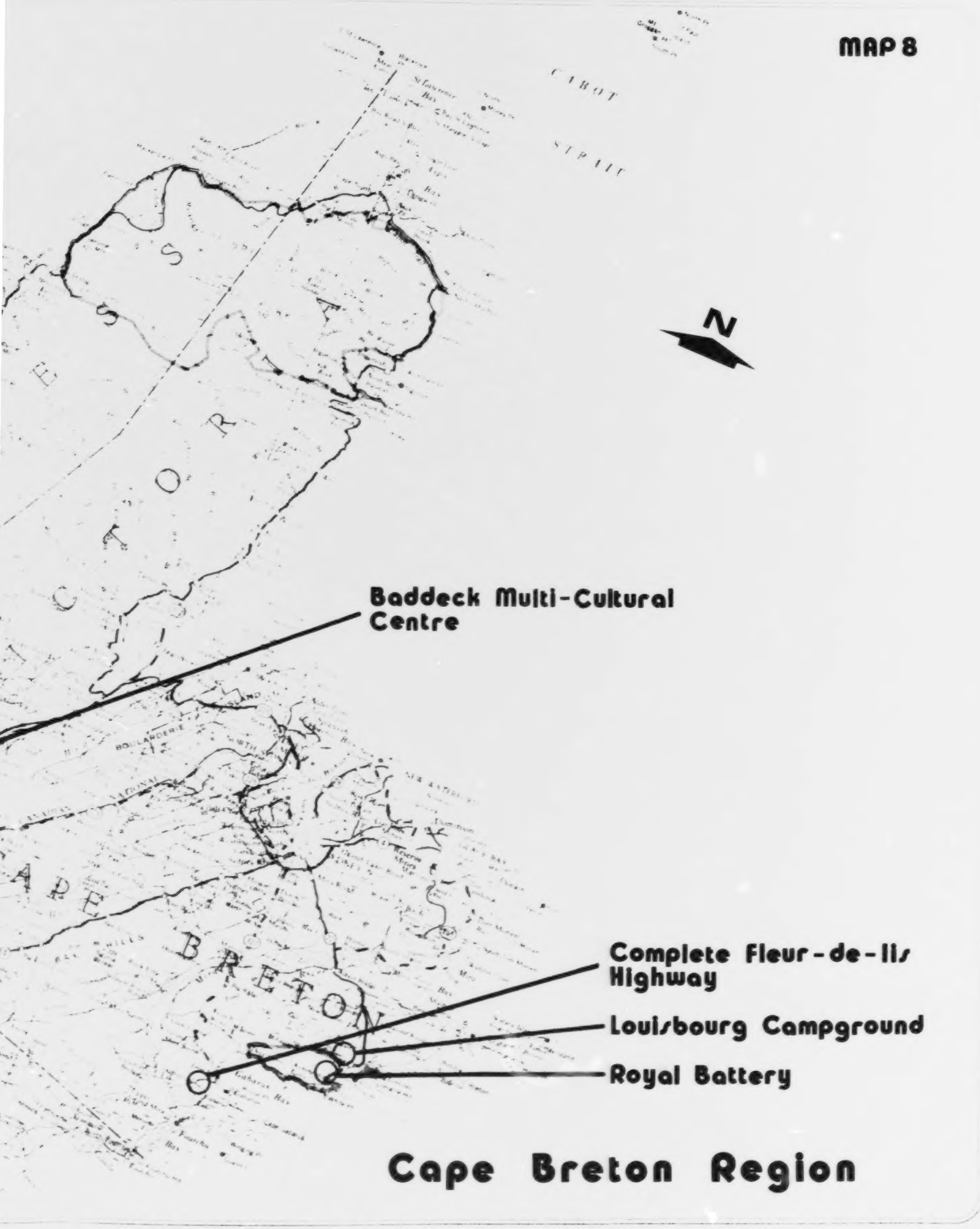
SOFTWARE PROJECTS

MANAGEMENT AND TRAINING
MARKETING

Rating System


Margaree Wildfowl Preserve
Mabou Highland Park
Port Hood - PEI Ferry
Boating - Bras d'Or Lake
Isle Madame Fishing Village
INVERN
RICHMOND
BRAS D'OR LAKE

MAP 8


CABOT STRAIT
VICTORIA
CAPE BRETON
BOULARDERIE
N
Baddeck Multi-Cultural Centre
Complete Fleur-de-lis Highway
Louisbourg Campground
Royal Battery

Cape Breton Region

NORTHUMBERLAND SHORE REGION

Priorities in the Northumerland Shore region were assessed in three separate meetings (Amherst/Tatamagouche, Pictou County, and Antigonish County), reflecting the existing tourism industry organization within the region. Despite some sub-regional differences, it is possible to identify a common thread in terms of tourism development priorities.

The coastline, the beaches, the warm water, and the attractive scenery are obviously considered to be a regional asset that should be developed and exploited. Beach developments were identified as a high priority in all three sub-regional areas, ranging from day-use beaches to major beach developments which could include accommodations.

In terms of facilities, highest priority is given to incentive programs for accommodations, restaurants, and campgrounds with one area (Cumberland/Colchester) also highlighting the need for a bed and breakfast program.

The transportation projects selected were generally designed to encourage tourists to leave the 100 series highways and follow the secondary roads through the region. Projects designed to achieve this objective include entrance treatments at key junctions, an expansion of the Sunrise Trail, signage identifying local events, and rest stations which would also provide information. In a sense, these transportation projects are designed to attract the tourists into the sub-regional areas.

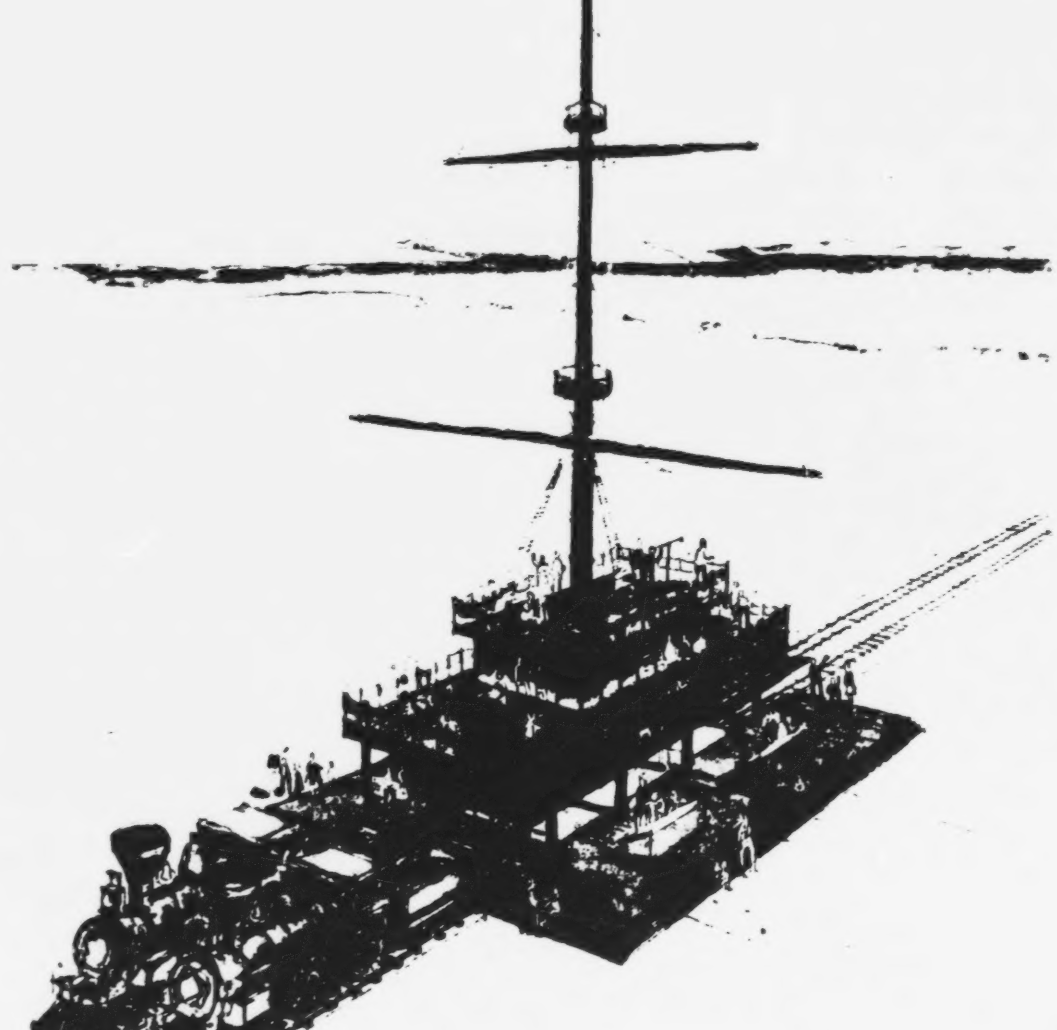
Marketing also received a high priority throughout the region with emphasis on Marketing the Region Outside the Region. Increased marketing in Quebec promoting the warm water beaches, and the provision of more information to tourists once they're inside the region in an effort to lengthen visitation were viewed as important in this regard.

Within the three sub-regions, the physical projects identified, excluding beach developments, varied, but are clearly related to the unique physical and historical aspects of the sub-areas. The priorities are as follows:

Cumberland/Colchester - Acquisition and development of Drysdale Falls as a unique feature of the area received very high priority. The Chignecto Ship railway at the Amherst entry point was proposed as a theme attraction. The Oxford/Wentworth Theme Festival based on the resource industries of maple sugar, blueberries, strawberries and a trail system were also ranked high.

Pictou County - Two projects emerged as having priority following the major beach development. These projects included continuing improvements and restorations in the Town of Pictou and the Museum of Transportation and Industry in the four Towns area, which are designed to strengthen existing tourist centres. Further work on the Trenton Centennial Park is also of high priority. This project would also be used to encourage winter activities such as skiing and snowmobiling.

Antigonish County - Following beach development, priority was given to the Antigonish Museum designed to depict local history and the Antigonish Gateway project intended to encourage tourists to pause and learn more about the area.



CHIGNECTO SHIP RAILWAY

Thus, while there are some projects that are sub-regionally specific, there are also many areas of common concern that were identified throughout the entire Northumberland region in the areas of facility development incentives, marketing, training, and beach/shoreline developments.

Tables 8 through 10 on the following pages show the priority ranking of development proposals for the Northumberland Shore region. Map 9 following this table provides a cross section of proposals on a locational basis for the region as a whole.

ACTIVITY CENTRE
BEACH

TABLE 8

NORTHUMBERLAND SHORE REGION (CUMBERLAND/COLCHESTER)

Assessment of Development Priorities in the Tourism Sector:

PRIORITY LIST OF HARDWARE PROJECTS

1. Beach Development
2. Drysdale Falls
3. Sunrise Trail Entrance
4. Chignecto Ship Railway
5. Country Inns/Bed & Breakfast
6. Oxford/Wentworth Theme Festival
7. Amherst Entry Point

Sunrise Trail Expansion

9. Mini Trails

Rest Stations

11. Interpretation Displays

Accommodation and Restaurant Incentives
Campground Incentives

14. Accommodation Pugwash/Tatamagouche Area
15. Local Cuisine
16. Tatamagouche Railway Cinema

17. Tidnish Gateway
18. Farm Vacation
19. Horseback Riding
20. Mini-Van System
21. Tatamagouche Tour Bus

Rest Stop
Excursion Train

24. Seafood Delivery System
25. Signage
26. Cottage Rental Agency
27. Maritime Lumber Bureau

SOFTWARE PROJECTS

MANAGEMENT AND TRAINING
MARKETING

Rating System

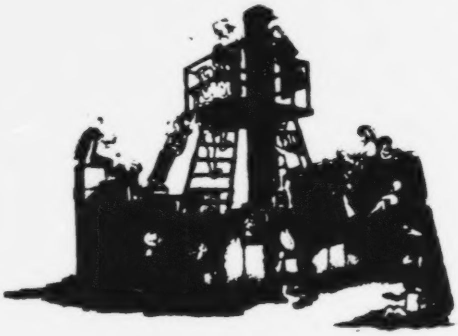


TABLE 9

NORTHUMBERLAND SHORE REGION (PICTOU COUNTY)

Assessment of Development Priorities in the Tourism Sector:

PRIORITY LIST OF HARDWARE PROJECTS

1. Major Beach Development
Town of Pictou Developments
Campground Incentives
4. Signage
5. Trenton Centennial Park
Museum of Transportation and Industry

7. Accommodation & Restaurant Incentives
8. Beach Accommodations
9. Local Cuisine
10. Pulp and Paper Exhibit
Sutherland River Gateway
12. Green Hill Look-off/Theme Park
River John Restorations
14. Rest Stations
15. Mini Trails

16. Farm Vacations
Toney River Pull-Off
18. Seafood Delivery System
19. Bed and Breakfast Program
20. Excursion Train
21. Big Cove Theme Park
Horseback Riding
Mini-van System

SOFTWARE PROJECTS

MANAGEMENT AND TRAINING
MARKETING

Rating System

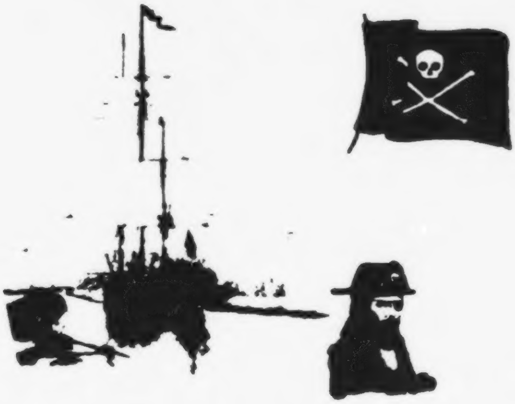
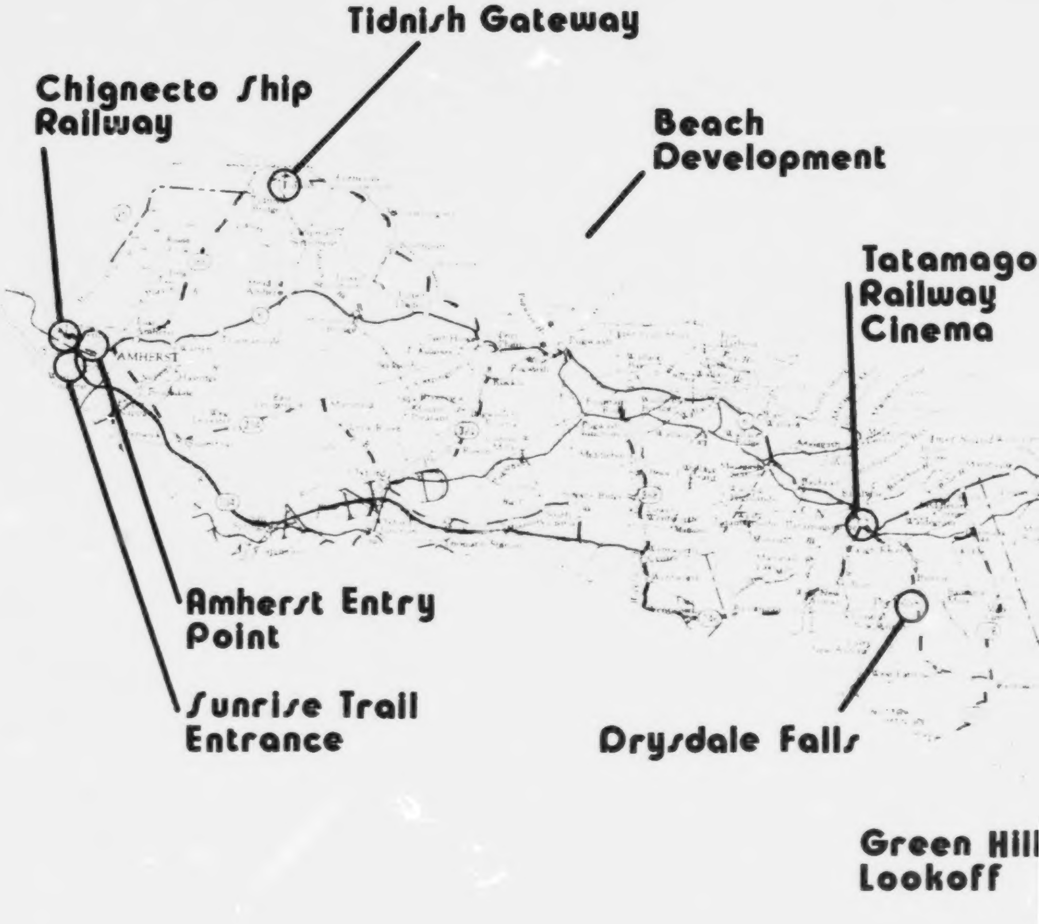


TABLE 10

NORTHUMBERLAND SHORE REGION (ANTIGONISH)

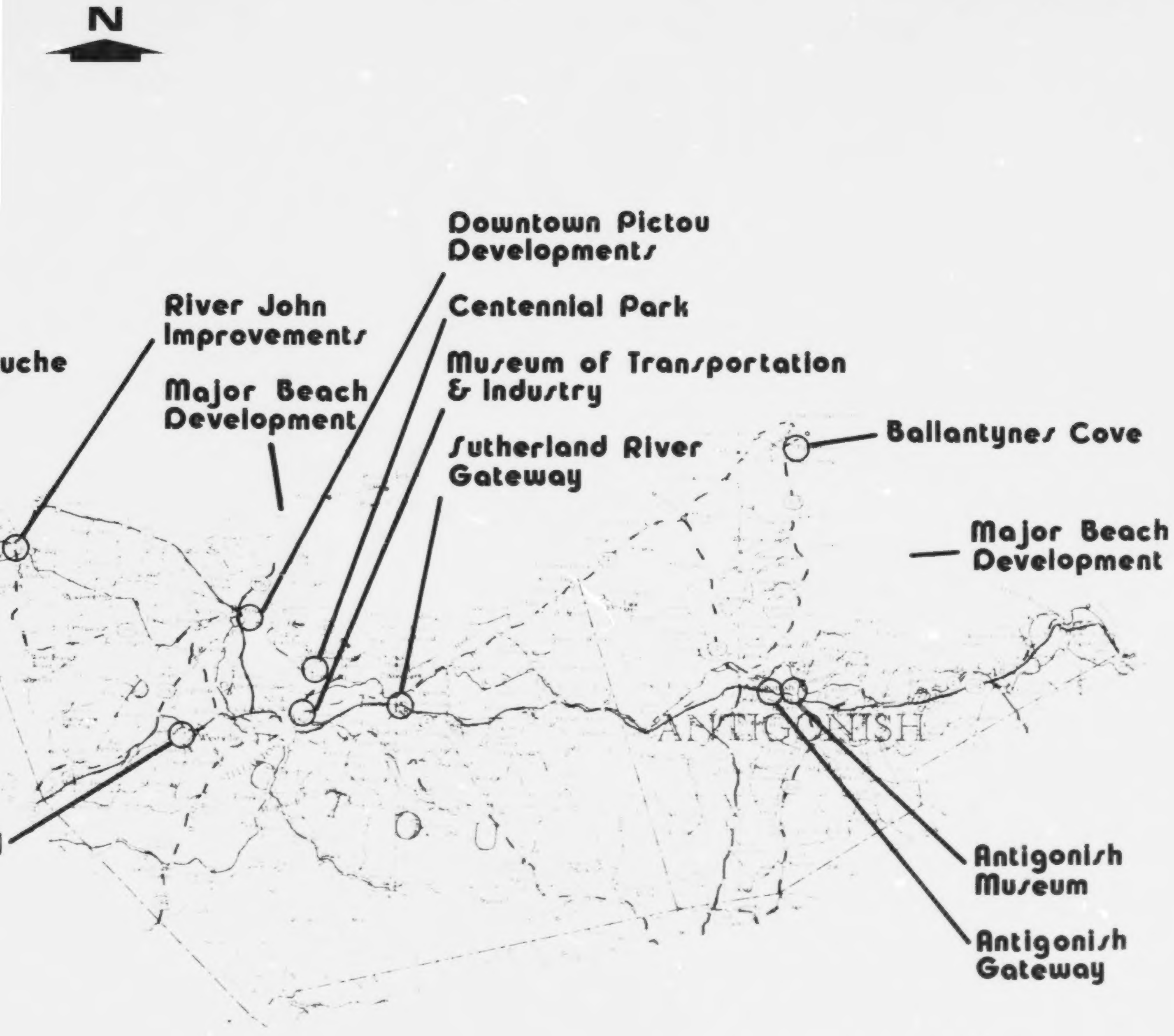
Assessment of Development Priorities in the Tourism Sector:

PRIORITY LIST OF HARDWARE PROJECTS	SOFTWARE PROJECTS
1. Major Beach Development	MANAGEMENT AND TRAINING
Day Use Beaches	MARKETING
3. Antigonish Museum	
Antigonish Gateway	Rating System
5. Rest Stations	
6. Ballantynes Cove	
Accommodation and Restaurant Incentives	
8. Campground Incentives	
Interpretative Displays	



Tidnish Gateway
Chignecto Ship Railway
Beach Development
Tatamago
Railway
Cinema
AMHERST
Amherst Entry Point
Sunrise Trail Entrance
Drysdale Falls
Green Hill
Lookoff

MAP 9


N
Downtown Pictou Developments
River John Improvements
Centennial Park
uche
Museum of Transportation & Industry
Major Beach Development
Sutherland River Gateway
Ballantynes Cove
Major Beach Development
ANTIGONISH
TOU
Antigonish Museum
Antigonish Gateway

Northumberland Shore Region

FUNDY SHORE REGION

Attraction and transportation proposals were viewed as the high-priority needs in the Fundy Shore region. The region combines one of the most highly developed tourism centres, Truro, with two less developed areas; south-west Cumberland County and East Hants. The importance of transportation to Truro is fundamental to a successful travel industry in this area. Underdeveloped parts of the region are recognizing the significance of transportation and travel patterns in future development of the tourism industry.

Amongst the highest priority attractions to bring more visitors to south-west Cumberland County are the development of waterfall tours, tidal action signage, the Joggins Fossil Cliffs and the development of Ottawa House as a country inn. Development of these attractions would be enhanced if the highway 9 from Joggins to Advocate is paved throughout its length.

Similarly in East Hants, the Hayes Cave proposal was given highest priority. The participants expressed great concern over conservation of this fragile environment and supported the need for proper site management.

It was also recognized that the construction of a tidal power barrage across Cobequid Bay could become a great benefit to tourism development. However, until this project gets underway, participants emphasized the current need to inform tourists through tidal action interpretive points.

More than 70% of Nova Scotia's auto traffic passes through Amherst on their way to Truro and Halifax, by-passing less developed portions of the Fundy Shore region. High priority was placed on rest stations and signage designed to inform these travellers of the nearby attractions and facilities. This was further emphasized during private discussions by the suggested need for an information outlet on Highway 104 before the New Glasgow cut-off, and/or in the Glenholme area on Route 2. A significant benefit could be obtained by the region if only a small portion of these travellers could be diverted off pass-through travel routes.

The table on the following page illustrates the priority ranking of development proposals for the Fundy Shore region, followed by a map of the region locating a cross section of proposals.

Hayes Cave
Hants East

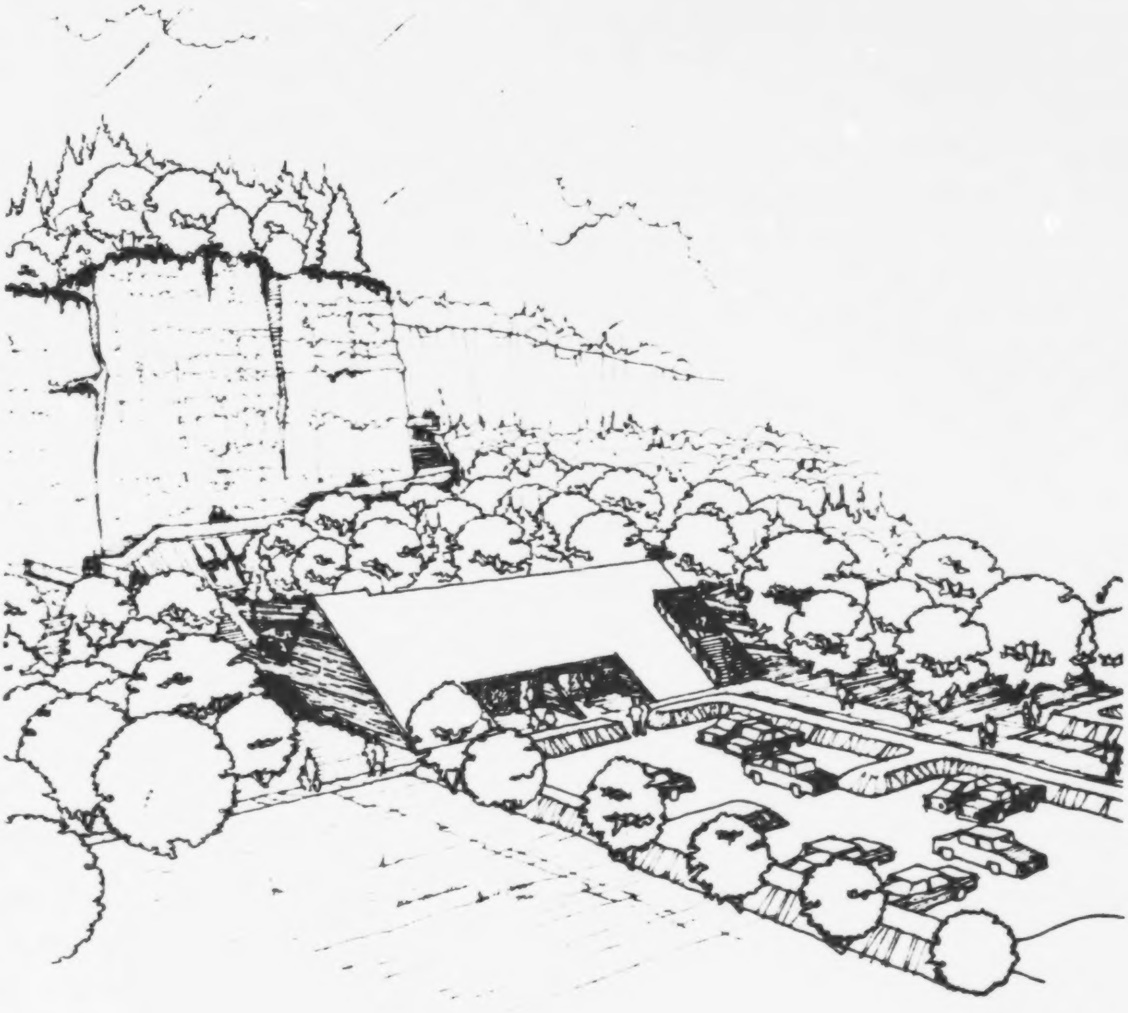


TABLE 11

FUNDY SHORE REGION

Assessment of Development Priorities in the Tourism Sector:

PRIORITY LIST OF PROJECTS

1. Hayes Cave
2. Waterfall Tours
3. Tidal Action Signage Points
Paving #9 Highway
5. Fossil Cliffs
Signage
Rest Stations
8. Ottawa House

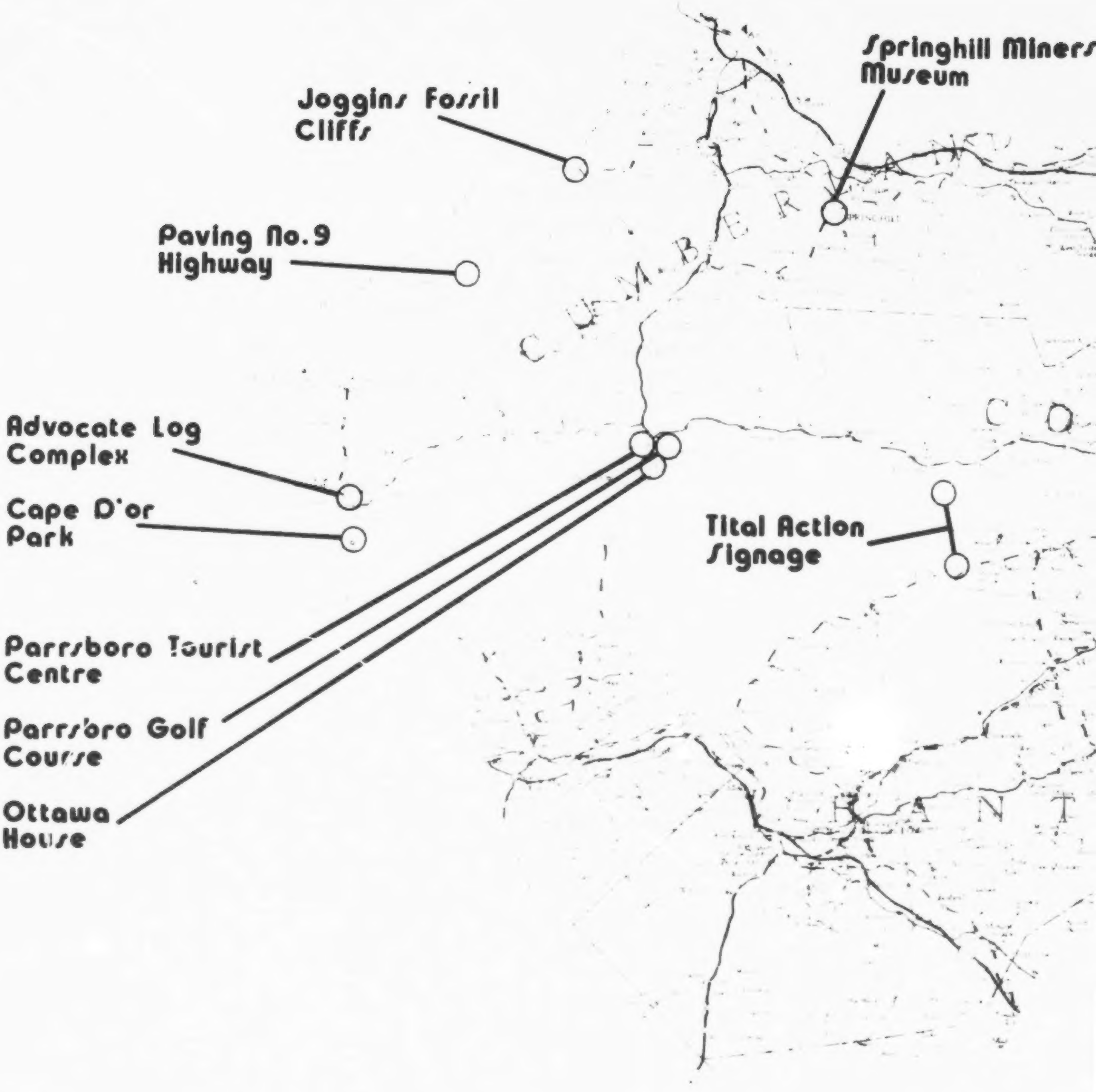
9. Cape d'Or Park
10. Sugary/Lunch Stop
11. Advocate - Log Complex
Mini-Discovery Trails
County Inns/Bed & Breakfast
14. Mini-Van System
15. Springhill Museum
Local Cuisine
17. Farm Vacations
18. Accommodation & Restaurant Incentives
19. Parrsboro Town Park and Golf Course

20. Truro Agricultural Story and Park
21. Naturalist Camps
Exit 11 Rest Stop (Stewiacke)
23. Seafood Delivery System
24. Horseback Riding
25. Parrsboro Multi-Use Tourist Centre
Tidal Observation Centre
27. Truro Campground
28. Excursion Train
29. Campground Incentives
30. Bud Johnson's Replicas
31. Stewiacke Animal Farm

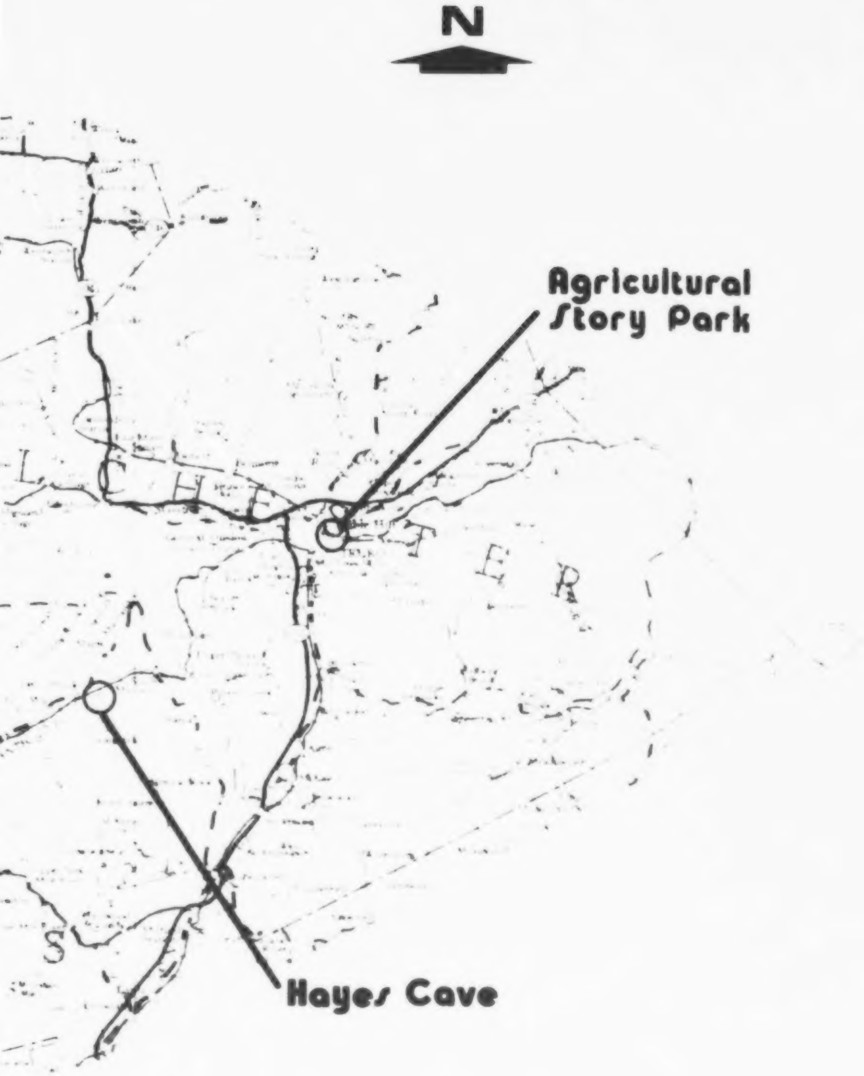
SOFTWARE PROJECTS

MANAGEMENT AND TRAINING
MARKETING

Rating System

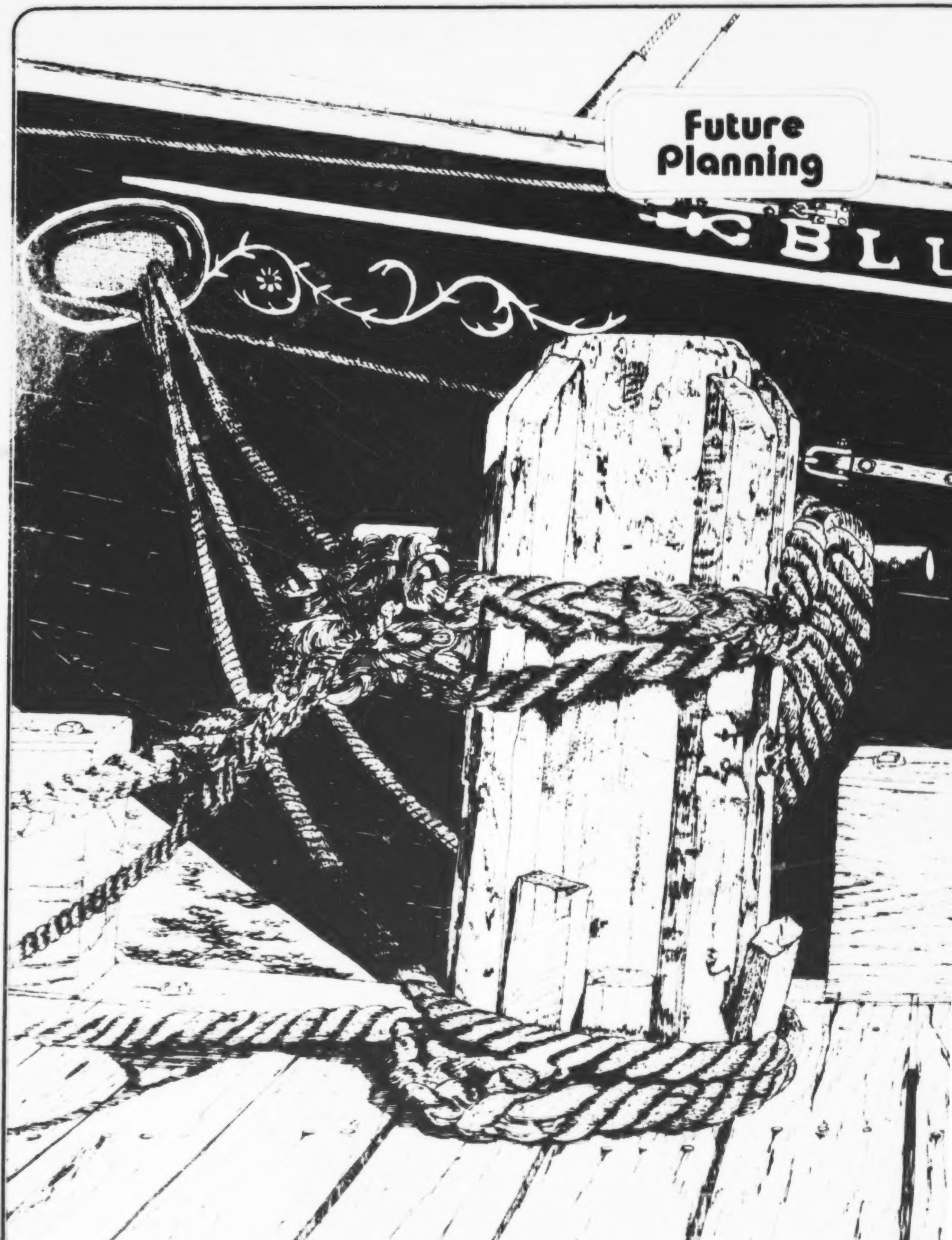

Springhill Miners
Museum
Joggins Fossil Cliffs
Paving No. 9 Highway
Advocate Log Complex
Cape D'or Park
Tital Action Signage
Parrsboro Tourist Centre
Parrsboro Golf Course
Ottawa House

MAP 10


N
Agricultural Story Park
Hayes Cave

Fundy Shore Region

Future Planning



The Tourism Plant

In summary, the travellers of today are becoming more descriminating in their vacation selection. In today's economy, visitors want value for their dollars, and they look for a vacation which will reinforce their particular lifestyle. Automobile and mass-mode travellers, including Nova Scotians, will be seeking out tourism destination/vacation complexes where a range of attractions, facilities and services are centrally located.

A major challenge now facing the tourism plant of this province is to fully develop and package well-serviced clusters of this type to meet present and future demands. Certainly, the Tourism Sector Committee of Voluntary Planning recognized this need in their report Tourism Development Strategy (April 1981). The report fully endorses the Department of Tourism's desire to enhance existing centres through the vacation area complex concept of the clustering of facilities, attractions, services and linkages into more packagable units having the potential to lure more visitors to each area, increase their length of stay and expenditures while increasing the length of the tourist season.

Changing Patterns

In the not too distant future, our principle markets will undergo several changes. People will continue to spend on vacations, but more and more, such spending will be coming from two income families as women enter the work force in increasing numbers. Population bases are changing as the children of the baby boom era mature. With the increasing number of middle-aged and retired travellers and the increased popularity of packaged vacations, the industry must move quickly to take advantage of the situation.

These changing patterns have had an influence on modes of travel, in particular motor-coach tours. This type of travel vacation has been steadily increasing over this past decade. Growth of mass modes of transportation will require a tourism plant that can service large numbers of people who will require a complete package of attractions, facilities and services.

Newer trends in the industry such as timesharing will have to be closely monitored as to their applicability to Nova Scotia. Timesharing involves the one time purchasing of a period of time each year, often a week, at a resort, condominium, etc., for life in the the case of fee simple ownership or for 12-40 years in the case of a right-to-use purchase. After the initial purchase, this allows the vacationer to afford luxury accommodations for one week each year paying only a yearly rental fee for maintenance and upkeep. Also involved in timesharing are international exchange networks which allow vacationers to exchange their period of use in one location with one in another resort, city or country. This concept has become very popular and profitable in the United States and Canada over the past decade.

Within Nova Scotia, adaptations of this concept might prove profitable even in view of our seasonality problem. For example, the cottage area on the Northumberland Shore or South Shore might have potential for the timesharing concept. As well, the concept can and has been applied to resorts, urban hotels, cabins, vacation homes, campgrounds, recreational vehicles and boats. The key to timesharing is the ability to sell and book all available units solidly enough to offset costs and promotional expenses over time.

Awareness

To some degree, each of the seven tourist regions of this province experience a varying level of awareness in the marketplace. Among the regions, Halifax and Cape Breton's Cabot Trail are the most well known by the non-resident Canadian. Outside of Canada, if Nova Scotia is perceived at all, it is viewed by many to be difficult to reach, a place of history, beautiful scenery and little else.

Tourism figures related to visitor volumes and revenue shares have not reached their growth potential over the past few years. To a great extent, this trend may be attributed to a loss of awareness in the market created by inflation and increased competitive advertising activity. Long-term tourism strategies and budgetary policies must attempt to reduce this awareness gap by better communicating the Nova Scotia product to potential visitors.

Transportation considerations, plant inadequacies, changing market patterns and insufficient awareness will all impact on Nova Scotia's travel industry. As well, due to uncertainty caused by, extremely high interest rates and costs combined with our short seasonality, there has in recent history been a scarcity of funds to develop vacation complexes and to take advantage of other tourism opportunities.

Nova Scotia does have potential for growth in tourism and some selected growth of the tourism plant and product is vital if the Province is to maintain and increase its market position. The Provincial Tourism Master Plan for Nova Scotia has analyzed future trends and strategies in the industry while reviewing the results of the private sector regional meetings. Now the detailed planning process must begin, concentrating on those proposals which received a high-priority ranking throughout the Province.

Detailed programs must be developed for Management and Training and Marketing. The next stage of the planning process will also involve the development of site specific data, realistic cost estimates and designs, the setting of feasibility parameters, and capacity studies and the solicitation of other government input related to the proposals.

Priority will be placed on creating a linked network of tourism destinations which support and reinforce each other, thus strengthening the overall prospects for packaging and success in tourism regionally and provincially. Equal attention will be given to product-development (the hardware) and human resources and marketing development (the software) within the tourism sector.[63]

As well, the continual need for flexibility and reassessment should be recognized to be a viable planning document for the 80s, the Master Plan must be a "living" document in which priorities and new opportunities can be changed and added as current trends in the industry demand.

Private/Public Sector Roles

As the projects and programs undergo substantial refinement, attention will have to be paid to the role of the public and private sectors. In many of the hardware projects where parks, environmentally protect areas and transportation systems are involved, these will naturally fall within the purview of the public sector. In this instance, the public sector by its nature can provide a more encompassing approach to province-wide problems, while ensuring that valuable natural resources are developed and preserved for the enjoyment of present and future residents and non-residents.

In some instances, proposals will fall completely to private sector investment, development and maintenance. Regional Associations should keep particular watch on proposals contained in their regional plans which can be encouraged and developed in this manner. For throughout this process, the prime initiative and responsibility remains with the private sector.

As well, several projects and programs will require a continued cooperative effort between the two sectors as the planning process itself has illustrated. In such cases, government should act as a catalyst in providing information and support for development opportunities to encourage and stimulate development by the private sector, while keeping the industry involved in the evaluation of future programs and projects.

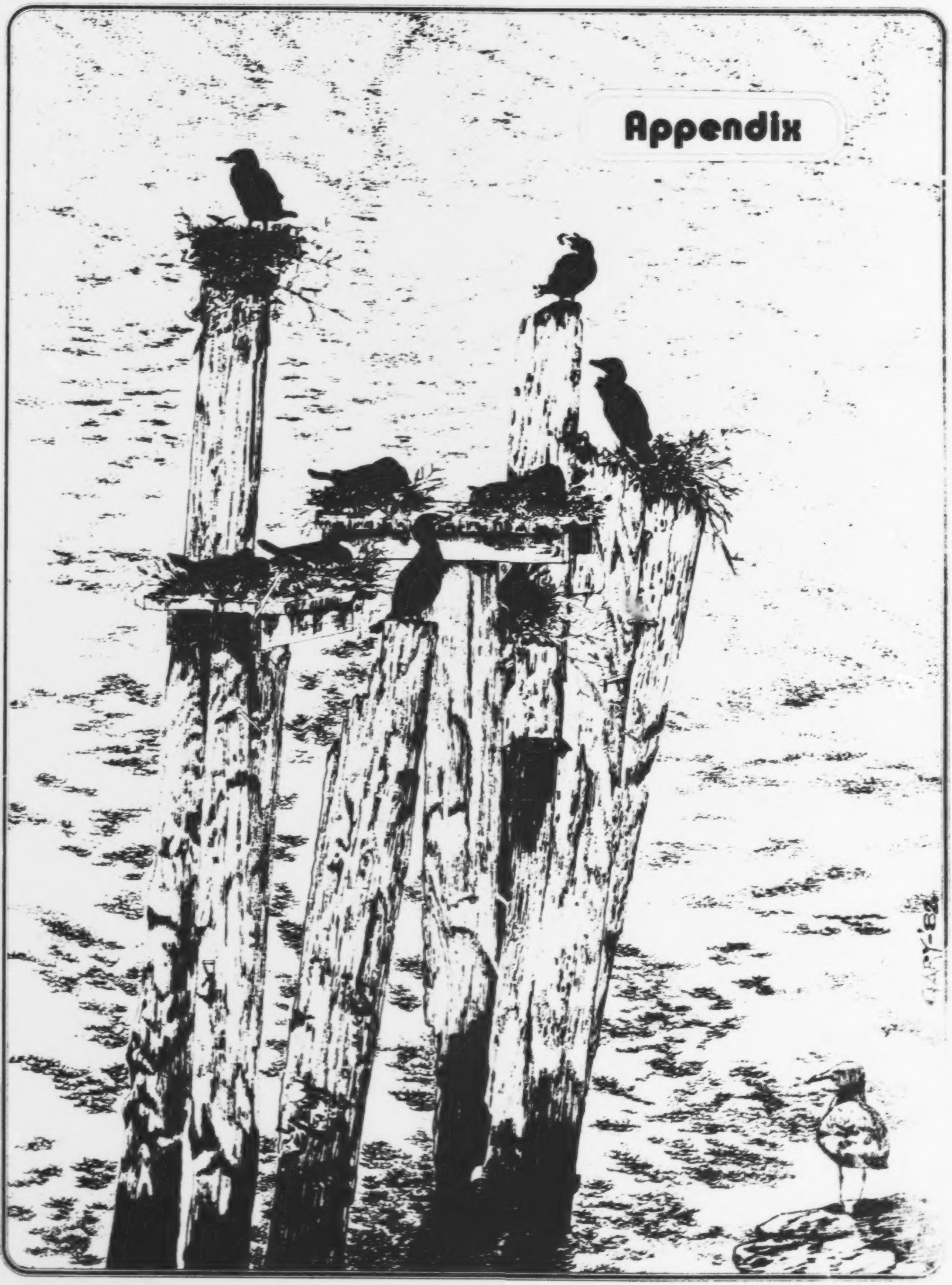
FUTURE PLANNING

Already the planners have begun to put pencil to paper in the process of detail design of many of the capital projects identified as having high priority. Similarly, work is proceeding towards developing the details of various Awareness, Management Training, Marketing and Incentive programs.

The past three years of government/private sector joint cooperative effort has left us with a clear understanding of the existing plant, the direction in which both public and private sector would like to proceed and a feel for the trends which are now evolving in the tourism industry. More importantly, however, is the significant channel of communication which has developed between government and private sector organizations. This rapport which has been generated from many hours of discussions at meetings throughout the Province, in itself is well worth the effort.

It is time for all areas of both the public and private sectors to recognize that tourism deserves an important place in the economic planning of this Province. This document spells out a series of common objectives developed from careful consideration of all areas of the industry. The time is now right to develop a plan of implementation geared to capitalize on the opportunities of the tourism industry. Not only the opportunity to increase income and employment, but also to preserve and enhance Nova Scotia's history, culture and lifestyle.

Appendix



Appendix A

Footnotes

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POOR

QUALITY

ORIGINAL